



**INSTITUTE  
of MUSEUM  
and LIBRARY  
SERVICES**

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Dear Colleague,

Please find enclosed sample narrative sections from successful 1999 IMLS General Operating Support grant applications. Please remember that these samples provide examples of how different museums describe their operations. Your application should be an original description of the distinct nature and characteristics of your own institution.

The enclosed narratives consist of two or three samples of each of the ten sections from 1999 General Operating Support grantees. A variety of disciplines and budget sizes are included so that you may see how museums with different situations and characteristics respond to similar narrative questions. Each sample includes a level of detail, descriptive style, and organization that is appropriate for that museum.

Please note that when IMLS prepared these narratives for dissemination, the format of the narratives changed. In the original formatting, each narrative section was approximately one and one half pages long. View each sample as a successful description of museum operations, not as a guide to your application's format. Also note that the page length restrictions are for the complete narrative; the length of each individual section may vary within the narrative. Consult the 2000 General Operating Support guidelines for all format questions, or contact the IMLS Office of Museum Services at 202/606-8539.

Additional copies of this sample narrative are available at the IMLS website, [www.imls.gov](http://www.imls.gov), or you may call the IMLS Office of Museum Services.

IMLS Staff

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*Washington, D.C.*

## 1999 General Operating Support Sample Narratives

	Audience	Collections	Exhibition	Management and Care	Education	Physical Facilities/Safety & Security	Staff	Governance/Financial Management	Support	Long Range Plan
Arboretum/ Botanical Garden		Rancho Santa Ana Botanic Garden, CA (\$2,590,710)		No. Carolina Botanic Garden, NC (\$1,415,452)						
Art				Amarillo Art Museum, TX (\$459,190)					Paley/Levy Galleries, PA (\$633,938)	
Children							Jasmine Moran Children's Museum, OK (\$588,161)			
General		Grace Hudson Museum/ Sun House, CA (\$340,997)			Florence Griswold Museum, CT (\$1,332,103)					
Historic House/ Site					Clermont State Historic Site NY (\$571,765)			Ethan Allen Homestead Trust, VT (\$255,823)		1719 Hans Herr House, PA (\$86,812)
History								Johnson County Museums, KS (\$694,609)	Historical Museum at Ft. Missoula, MT (\$342,907)	
Natural History							Denver Mus. of Natural History, CO (\$25,657,263)			
Science/ Technology	Montshire Museum of Science, VT (\$1,582,585)		St. Louis Science Center, MO (\$14,525,680)							
Nature Center	Mohonk Preserve, NY (\$1,172,305)		Effie Yeaw Nature Center, CA (\$648,811)							
Aquarium/ Zoo						Cabrillo Marine Aquarium, CA (\$2,687,153)				Lincoln Park Zoo, IL (\$14,292,136)
Specialized				Photographic Resource Center, MA (\$552,690)		Erie Canal Museum, NY (\$479,589)				

## Audience

Montshire's name reflects its service area - the bi-state region of Vermont and New Hampshire. The central core region of approximately 39 towns in central VT and NH includes a white-collar college town along with towns formerly relying on manufacturing and now, with varying degrees of success, trying to replace this disappearing economic base. It is a rural constituency (the U.S. Census Bureau ranks Vermont first in the nation for percentage of population living in rural conditions) with a total core population (one hour driving radius) of approximately 140,000. Total bi-state population is under 2 million. There is a high incidence of rural poverty (New Hampshire leads the nation in per capita eligibility for the Aid to Families with Dependent Children, Vermont is 7th). There is not a significantly large ethnic minority in the region. About 28% of Montshire's visitors are non-local, 66% visit with family, and 18% are with organized groups.

The Museum communicates with its audience through various mechanisms: extensive use of local print and electronic media with weekly press releases, special professionally-produced (a donated service) radio and TV public service announcements (which because of their quality receive extensive air-time), a weekly "What's New at Montshire" quarter-page newspaper ad sponsored by a local bank, a quarterly newsletter/calendar, 32 page Program Guide booklets (2 per year, sponsored by local business) and selective paid advertising. Museum membership in local and state tourism associations provides access to their publications and distribution systems for Museum promotional brochures. The Museum's website ([www.montshire.net](http://www.montshire.net)) is updated regularly and is actively used for exhibit and program information, paid and volunteer work opportunities, and other Museum information activities. Data from the Museum's in-house weather station is constantly uploaded to the site for public benefit and to stimulate public contact.

Because of the rural nature of its service area, the Museum recognizes that to effectively serve many of its constituents a strong outreach component is also essential. It operates a large "bread-truck" type vehicle and a van for extensive outreach activities serving rural schools, weekend and after-school kids programs, and for educational demos and activities at regional fairs and festivals.

Special emphasis encourages use of Museum facilities by individuals or groups that might not otherwise participate. Admission fees are waived for any individual or group that finds the fee a hindrance to participation (6,023 admission waivers or reductions in 1998) and an active scholarship program is maintained for Museum programs. Close contact with social service agencies communicates our sincere interest in involving special needs groups and provides a linkage with this audience. A camp-in program oriented to young women conducted in collaboration with Dartmouth's Women In Science Program is but one of numerous ways the Museum encourages science interests among young women. A special needs advisory committee reviews Montshire's programs and plans to assure accessibility. Assistance is arranged for visiting groups with special needs (e.g. a signer for hearing impaired) and other efforts are made to actively encourage Museum use by disabled constituents (the Museum's staff training on disabled issues was broadcast on local TV as an exemplary program). In 1998, Montshire collaborated with ASTC, serving as a pilot site for an initiative to promote greater accessibility in science museums. A multi-purpose room is made available free to other non-profit organizations, a community service that also attracts people who might otherwise not think about coming into a science museum.

The Museum is open for public visitation and activities 362 days each year, from 10:00 a.m. until 5:00 p.m., closing only on Christmas, Thanksgiving, and New Year's Day. Special evening-hour public activities (19 in 1998) are also offered in the exhibit galleries. In addition to these open hours, the Museum's large multi-purpose room is frequently active with evening programs.

Programs are offered throughout the year to fit constituents' schedules: special family offerings are presented during school holidays and vacations, after-school programs travel to communities, adult programs are scheduled evenings and weekends. In the spirit of the New England church supper, Montshire has also offered inexpensive suppers to entice families to the Museum for an evening of entertainment and education. Nights are often filled with the active camp-in program with sessions available for families and teachers as well as for youth groups.

Montshire program participation by category (note: by calendar, not fiscal, years):

	<u>1997</u>	<u>1998</u>
School Programs (at museum)	13,900	15,703
School Outreach Programs	13,241	13,238
Adult and Family Programs	3,857	3,649

Children's Programs	<u>6,152</u>	<u>6,994</u>
Total	37,150	39,584

To put these numbers in perspective with the Museum's rural region, total current attendance and program participation exceeds the total population within an hour's drive of the Museum. The growth is consistent across the range of programs and the calendar and is the measurable result of efforts to keep closely attuned to the interests and needs of the community.

General attendance by quarter (measured by actual count):

	<u>Jan - Mar</u>	<u>Apr-June</u>	<u>July-Sept</u>	<u>Oct-Dec</u>	<u>Total</u>
1997	24,383	31,932	38,376	22,444	117,135
1998	25,106	33,944	36,942	25,729	121,721

## Audience

### 1. Who is the museum's audience?

The Mohonk Preserve is located in the semi-rural mid-Hudson region of southeastern New York, just a two-hour drive for greater New York City's 20 million residents. The Preserve is a crucial greenway for the lower-income, multi-ethnic population centers of Kingston, Ellenville, Poughkeepsie and Beacon/Newburgh -- all located within an hour's drive. Minority populations in these communities range from 24% in Ellenville to 49% in the City of Newburgh, which experienced a 38% increase in its minority population between 1980 and 1990. Concentrations of people living below the poverty line in these towns range from 14% in Ellenville to over 26% in the City of Newburgh. Protecting this resource for the benefit of all is at the heart of the Preserve's mission. Accordingly, as a multiple-use natural area, the Preserve draws an audience of varying socioeconomic levels, ages, and abilities. Members come from more than 38 states and 6 foreign countries. Annual visitation is approximately 130,000 people per year. Through its IMLS MAP III: Public Dimension Assessment award, the Preserve is assessing its audience's views and experiences of the Preserve. Additional funding is being sought to conduct a comprehensive visitor use and demographic study of visitorship in order to better define its growing audience and to be responsive to its visitors' interests and needs.

**Expanding Audience:** In recognition that 70% of its visitors enter the Preserve at its southern end, a new visitor center was opened in May 1998 in that location, which now offers a 9,000 square foot interpretive center - more than double the space of the previous visitor center. Because of its location at the primary entry point for the Preserve, the new Trapps Gateway Interpretive Center is expected to have 105,000 visitors in 1999 -- or an increase of more than three times the number of visitors to the former visitor center, which was located at the Preserve's more remote northern end. Exhibit space at the new center has nearly tripled, and parking has increased by 190 cars to accommodate this expanding audience.

**Children and families:** 57% of the Preserve's memberships are families. Serving 32 individual schools from 7 area school districts, the Preserve offers a K-6 natural science field studies curriculum, which provides more than 25,000 contact hours to area school children annually. Over the last two years, the Preserve has nearly doubled the number of school districts served, and has expanded programs for underserved school children in the lower-income, multi-ethnic cities of Beacon and Kingston. In order to increase its outreach to minority children, the Preserve is developing an Urban/Rural Watershed Water Quality Study Program in 1999 which will involve students from the lower-income cities of Newburgh, Poughkeepsie and Kingston in a study of water quality in the Hudson Valley watershed. The Preserve's Public Program series includes weekend presentations for children and families, such as nature talks, guided hikes, family fun, art activities and sing-alongs focusing on the natural and cultural history of this protected area. The Preserve has recently expanded the age groups served by developing special programs for preschoolers. Every summer, two environmental education day camp programs are offered for 30 children aged 7 to 13. The camp program will be expanded in 1999 to serve children ages 5-6.

**Scientists:** The Preserve's Daniel Smiley Research Center (DSRC) houses an extensive ecosystem database spanning more than 70 years and weather data covering the past century. Botanists, entomologists, ornithologists, ecologists, atmospheric scientists, geologists, naturalists, cultural historians, geographers and land managers are among the annual 50-plus researchers throughout the nation who request comprehensive ecosystem and resource management information from the Preserve. In addition, 54 Research Associates associated with 23 universities and research institutions affiliated with the Preserve in 1998 to conduct ecosystem research on Preserve lands. The Preserve is increasing the accessibility of its data to scientists worldwide through its participation as anchor research site for the Shawangunk Ridge Biodiversity Partnership -- a ten-member research consortium that is inventorying and mapping the natural communities in a 130-square-mile study area in order to apply that ecosystem information to cooperative, ridge-wide resource management. In 1998, the Preserve initiated an institutional membership program to encourage research initiatives and increased use of its resources by students and faculty of area colleges and universities.

**Recreationists:** Recreational user groups include families, singles and seniors, many of whom engage in multiple recreational opportunities at the Preserve. Of the agency's 6,553 members, nearly 50% are primarily hikers; others are primarily climbers, bikers, skiers, or hunters. (Deer hunting is only allowed at specific times during a restricted season, according to the agency's hunting policy.) The Preserve's internationally-known technical rock-climbing cliffs draw climbers from all over the world. The Stewardship Department maintains the Preserve's more than 51 miles of trails and carriage roads and provides ranger assistance to all visitors to maximize access by the visiting public. Public programs are targeted to meet the needs of specific audiences, according to lifestyle (e.g. hikes for families, with senior and singles hikes added in the last few years to serve these growing audiences); topic (nature, astronomy, cultural history, with new programs such as photography and recycling/composting added recently to reach new market segments); and recreational interest (such as talks on technical climbing; mountain biking clinics; and guided cross-country ski outings).

**Elementary Education Student Teachers:** The Preserve's teacher training program includes a graduate level course offered through the State University of New York (SUNY) at New Paltz and environmental education workshops for elementary classroom teachers. Over the past two years, 36 teachers have been provided with 96 hours of environmental education

instruction. The Preserve has increased the marketing of its workshops to this audience by becoming an affiliate of the Mid-Hudson Teacher Center (MHTC) in 1997. This affiliation ensures broad advertising of all workshops. Our education staff also offers an array of environmental education workshops at the annual conference of the New York State Outdoor Education Association (NYSOEA) and at other professional forums.

**Accessibility:** The Preserve was awarded Accessibility Awards in 1996 by the Association of Independent Living Centers and in 1998, by the Resource Center for Accessible Living, for its program to improve trail conditions for visitors with disabilities. Most of the Preserve's 25-mile carriage road network is accessible, and the Preserve offers a new Sensory Trail, specially designed for visitors with mobility challenges and featuring Braille reader stations. Both floors of the Trapps Gateway Interpretive Center are ADA-accessible, and the Center offers specially-designated parking, a ramp entrance, an elevator and restroom facilities for people with disabilities. The Research Center is wheelchair accessible and has an accessible restroom. Other handicapped parking is offered at key trailheads. Through its environmental education program *Nature Access*, the Preserve has offered special accommodations on field studies and in-classroom presentations for children with disabilities annually. In 1998, the program served over 100 special needs children.

**Media outreach and publicity:** The Preserve's publicity efforts include a 24-page quarterly newsletter, regular advertising in local newspapers, a web site, and an active media campaign to publicize the Preserve's achievements in ecosystem research, environmental education and land management. The Preserve has been covered by the *New York Times*, *Smithsonian*, *Reader's Digest*, *Discover*, *RNN News*, *Country Living*, the *Hudson Valley Journal*, the *Poughkeepsie Journal* and many other publications. Preserve staff have conducted speaking engagements at local community organizations; civic organizations; business groups; preservation groups; government/policy forums; and area colleges and universities (Union College, Schenectady; SUNY/New Paltz; Vassar College Environmental Studies Faculty). The Preserve also participates in a broad range of local festivals and community events annually.

## 2. How are the levels of public participation in the services the Museum provides appropriate?

The Preserve's highest level of participation is its annual number of visitors -- projected at 150,000 for 1999, as compared with 130,000 in 1998 and 100,000 in 1997. The 1993 Recreational User Survey revealed that most members visit the Preserve an average of 16 times per year. Between 1997 and 1998, there was a 44% increase in attendance at public programs (from 1,303 to 1,872), with the largest increases seen in expanded programs for families and children (96%, from 141 to 276 attendees) and in crafts programs (621%, from 14 to 101). In 1998, the Preserve increased the targeting of programs for high-demand audience segments, resulting in a significant increase in public program attendance. Overall, the Preserve is intensifying its efforts to target more, programs to serve school-aged children and families, which have proven to be two of the Preserve's primary audience groups. The only decline in public program attendance (-21%, from 295 to 233) was seen in natural history offerings, which were reduced in order to expand the range of other programs offered. The summer camp program saw a 15% decline in attendance (from 26 to 22), due to increased competition from other camps. (The camp is being expanded in 1999 and advertising is being increased to increase market share.) A decline in attendance from 21 to 16 for the SUNY teacher training course was planned in order to ensure program quality by reducing class size. Participation in the school field studies program has steadily grown. Between 1997 and 1998, the Preserve has made a concerted effort to expand its services to area schoolchildren. This has resulted in a 28% increase in the number of schools served (from 25 to 32) and a 9% increase in total contact hours provided (from 22,866 to 25,033) through the environmental education program.

Preserve lands are open from sunrise to sunset, 365 days a year. The Trapps Gateway Interpretive Center is open, free of charge, from 8 a.m. to 5 p.m. every day except Thanksgiving and Christmas. The Research Center is open daily, Monday to Friday, 9 a.m. to 5 p.m. Public programs are scheduled for evenings and weekends, especially to accommodate our large number of out-of-area visitors. Other programs are scheduled to meet constituent needs: school programs are held during school hours; access to the research collections is scheduled by appointment; and private use by outside groups of the Preserve's facilities (meeting rooms and outdoor pavilion) is made possible for a nominal fee. The Preserve employs its facilities/meeting room rental program primarily as a means to expand its audience by introducing people new to the Preserve to its lands, programs and services via a brief orientation and free on-land access on the day they rent the facilities.

	Total Visitors	Jan-Mar	April -June	July - Sept	Oct – Dec
1997	100,000	4,000	37,000	41,000	18,000
1998	130,000	7,800	35,100	53,300	33,800

Figures are calculated by day pass sales and member survey.

## Collections

### 1. How do the museum's collections support the statement of purpose?

RSABG maintains three major collections that directly support the mission to collect, cultivate, study and display California native plants and to offer graduate training and research in plant systematics and evolution: 1) the living collection (display gardens, plant communities, and active and long-term seed bank), 2) the herbarium, and 3) the library.

**Living Collection.** RSABG possesses the most complete collection of California native plants in the world. California, a botanically rich region, contains over 6,000 taxa of flowering plants or one-third of all known plants native to the United States and Canada. On the Garden's grounds, 3,083 species, varieties and cultivated forms are currently grown--a figure that represents roughly 45 percent of the taxa native to California. Moreover, the Garden's seed collection contains 2,408 accessions representing 1,300 species of native plants for use in research and display. In addition to these general collections, 220 taxa of rare, threatened and endangered native plants are maintained on the grounds or in the nursery, while another 166 threatened or endangered plant taxa (representing approximately 514 seed accessions) are being maintained in the long-term Center for Plant Conservation(CPC) related seed collection for research and possible future reintroduction efforts.

Eighty-three acres are devoted to RSABG's collections. The most recently installed display, the California Cultivar Garden, was opened to the public in April 1991 and features a collection of over 800 cultivated varieties of California native plants. RSABG has developed and introduced 90 of these cultivars, many of which are highlighted in a special area. This past year, the Garden also added a new display of Desert Cultivars to better demonstrate xeric plants for use in the arid southern California region. Other major collections include a Southern Riparian Woodland, a Fern Garden, a Home Demonstration Garden, a Woodland Garden, a Coastal Garden, a Desert Garden, a Palm Oasis, and seasonal Wildflower Displays. In addition to these special and interpretive displays, the Garden maintains a series of plant community sections which represent 19 of the 29 plant communities originally described by Munz and Keck for California.

**Herbarium Collections.** Reflecting the strong research mission of the Garden, the herbarium contains one million specimens, and ranks 13th among the 300 or so museum collections (herbaria) in North America. It is particularly rich in specimens from California (#1 in the world for southern California), western North America, Mexico, Australia, the Pacific Islands, the former Soviet Union, and the Mediterranean basin. The collection has a broad phylogenetic representation, with most families and subfamilies of the flowering plants represented. An ancillary study collection of 6,000 wood samples, 20,000 pollen slides and 40,000 wood slides augments the primary collections. Over the eleven years between 1987 and 1998, the herbarium accessioned more than 240,000 specimens to its collection, including 120,000 sheets from the vascular plant collection of the Los Angeles County Museum of Natural History, and annually accessions between 10,000 and 15,000 new specimens. During the past two years, the herbarium has received funding from the Homeland Foundation to incorporate the personal herbarium collections of Louis C. Wheeler (deceased former professor of botany at USC) and Mrs. Mary DeDecker. Both collections, together totaling 39,500 specimens, contain outstanding representations of the California flora, including many areas in remote mountains and the Mojave Desert not explored by other botanists. The herbarium is designated as one of twenty-five National Resource Collections in the United States, only five of which are located in the West.

**Library Collections.** The library's collection contains approximately 42,000 volumes including over 500 periodical subscriptions focusing on the flora of California, the western United States, the Pacific Basin, and other Mediterranean climate regions of the world. The collection is particularly strong in systematic botany and evolutionary biology--including floras of the world, taxonomic literature, and materials relating to California. It is also strong in California natural history, native plant horticulture, ethnobotany of the Southwest, water conservation, and drought tolerant landscaping. Special collections include rare books dating as early as 1525, a major reprint collection, all available California topographical maps, and the largest assemblage of nursery trade catalogues in the West. The library belongs to the On-Line Computer Library Consortium (OCLC) and it is linked to the Honnold Library of the Claremont Colleges which provides researchers and students access to the larger holdings of the Claremont Colleges consortium as well as other national network research services in the sciences.

### 2. What is the significance of the collections to the museum's communities and constituents?

The Botanic Garden's collections constitute a significant scientific, horticultural and educational resource for a community and region where species and habitat loss are critical issues. The flora of California is among the largest of any state in the United States or province in Canada, comprising between 25 and 33 percent of the total number of known taxa in

North America north of Mexico. According to the recent Jepson Manual (1993), 6,013 different kinds of native vascular plants grow here--a level of diversity that exceeds every other state including Hawaii. Not only is this floristic assemblage remarkable for the total number of species represented, but for its wealth of endemic species as well. Estimates of endemism in California are placed as high as 2,153. Not surprisingly, then, California also contains about one-quarter of the federally listed endangered plant species in the U.S., and over half of these are located in Southern California.

As the most populous state in the U.S., the environmental impact of California's many commercial and agricultural centers is compounded by rapidly spreading residential and recreational developments. In the next 20 years, the State's population is expected to double from 30 million to 60 million. Not surprisingly, California also has the greatest number of plants--about 1,742--which are in need of some form of protection, and ranks high on federal priority lists. With population and associated pressures continuing, California is among the world's most endangered bioregions. For this reason, the Center for Plant Conservation has identified California as one of its five priority regions in the U.S.

The Garden's collections are invaluable tools for the Garden's efforts to preserve rare, threatened and endangered native plants through its research, conservation, and public education programs. Floristic studies undertaken in conjunction with the herbarium staff help to identify individual species and habitat areas that are under pressure from development. Likewise, the Garden's Seed Program holds 514 accessions (representing 166 federal or state listed rare, threatened or endangered species) in the Garden's long-term seed storage program as part of its seed research and other *ex situ* preservation efforts. The public education programs make excellent use of the living collections as a living museum to inform the public about threats to plants and the value of disappearing habitats. In addition, water conservation is a critical issue for the arid southern California region. The southern areas of the state contain approximately two-thirds of the state's population, but much less than one-third of its water--thus forcing it to import northern California and Colorado River water to serve its 20 million residents. Because of the critical need to conserve water in the face of persistent droughts, there is growing interest in landscaping with native species and drought tolerant plants from other semi-arid zones. Consequently, RSABG's collections and displays--such as the Desert Cultivars display recently completed in the California Cultivar Garden through a grant from the Stanley Smith Horticultural Trust--provide a demonstration laboratory for drought-tolerant gardens.

The collections hold special interest for professional botanists, horticulturists, land managers, planners and policy makers as a source of scientific data on native plants. The Garden's extensive living collection of native California plants is one of the few in existence which, with the exception of cultivars, is entirely collected and field documented from wild sources (accession records for the living collection are maintained by the horticulture department just as they are for the herbarium records). Similarly, the library houses one of the most extensive botanical research collections in the region. The library's extensive holdings in horticulture, natural history, conservation and the nursery trade, as well as botany, make it a valuable resource to a broad public audience in addition to academic researchers.

The herbarium is the largest in southern California and third largest in the western U.S. The herbarium's goal is to develop and maintain the world's best collection of vascular plant specimens from California, and one of the best collections of plant specimens from the western United States, Mexico, and other regions with arid, semi-arid and Mediterranean climates throughout the world. The collections have developed steadily over the last 70 years, primarily through the fieldwork activities of such Garden researchers as Philip Munz, Peter Raven, Verne Grant, Robert Thorne, Lee Lenz and, more recently, Steve Boyd, Travis Columbus and Mark Porter. In addition, a large collection of specimens owned by Pomona College was integrated with RSABG's collections in the mid-1960s (in 1998, formal ownership of the collection was transferred to RSABG). The Pomona collection includes an important type collection from the noted explorer and botanist Marcus Jones.

As one of the premier institutions for holdings from its designated geographic areas, the herbarium works to cooperate with and complement the acquisition policies of other collecting institutions. In 1997-98, the herbarium exchanged a significant number of specimens, sending 2,516 specimens to 22 other institutions, while receiving 9,042 specimens from 68 institutions. In addition to Garden researchers, 99 outside visitors made use of the herbarium collections in 1997-98. Although still at a planning stage, the future conversion of herbarium's specimen label data to computer format will increase their accessibility, and therefore value, to a wider group of users such as researchers and government agencies conducting taxonomic and ecological studies.

For many of visitors, the Garden's significance stems from the relief that it provides from the stresses of living in the huge, densely populated, complex and fast moving metropolitan Los Angeles area. The Garden offers a quiet oasis from urban life, and allows people to reestablish personal ties to the natural world. By providing a place where people can bond with nature, the Garden affects people's attitudes and, hopefully by extension, their behavior toward the natural world.

## Collections

### 1. How do the museum's collections support the statement of purpose?

The basis of the Hudson Museum collections is a family estate of over 30,000 diverse, though inter-related objects. This estate is the multi-generational product of the unusual and talented Carpenter-Hudson family. Aurelius O. Carpenter (1836-1919) and his wife, Helen McCowen Carpenter (1835-1917), were among the earliest White settlers in Mendocino County. They developed close lifelong ties with their Pomo Indian neighbors. Clarina Nichols (1810-1885), mother of A. O. Carpenter, later joined her son out West. A well-known publisher, abolitionist, and suffragette, Nichols served as an “elder stateswoman” of the 19th century women's rights movement. A. O. Carpenter included publishing, journalism, and photography among his many business and civic activities, operating a studio for over 30 years. His work is found in many historic and ethnographic photographic collections. Helen Carpenter managed to write prolifically while raising four children, teaching school, and assisting her husband in his business. She published essays and poetry in popular periodicals, and authored a 300 page text, “Be-Lo-Ki” on the cultural practices and early history of local Pomo peoples which she attempted, unsuccessfully, to publish. Her 1857 diary, detailing their journey from Kansas to California in an oxcart, was published posthumously and is cited frequently by historians of the West. Grace Carpenter Hudson (1865-1937), the Carpenters' youngest daughter, displayed artistic talent at an early age. Her sensitively rendered oil portraits of American Indians, most depicting the Pomo peoples she had known from birth, made her nationally famous during her lifetime. Today her paintings hang in the Palm Springs Desert Museum, the National Museum of American Art, the Oakland Museum of California, and the Eteljorg Museum, among others. Her husband, Tennessee physician John W. Hudson, shared this interest in Native peoples. The couple worked collaboratively to document what they believed to be “vanishing” traditional Indian cultures. Dr. Hudson abandoned his medical practice to study Pomo peoples and collect Pomo artifacts, particularly their superlative basketry. A self-trained ethnologist, Hudson was soon considered to be “the” non-native authority on the Pomo. He became assistant ethnologist for the Field Columbian Museum of Chicago, taking photographs, recording cultural information, and collecting artifacts among some twenty additional California Indian tribes. The Smithsonian Institution's Natural History Museum, the Brooklyn Museum, the Field Museum of Natural History, and The Heard Museum all contain documented collections of California Indian material, especially basketry, assembled by John Hudson.

The Hudson Museum has significant holdings of ethnographic artifacts, field notebooks, manuscripts, correspondence, photographs, artwork, books, and household objects, all produced or collected by members of this family. The Sun House, a 1911 redwood “Craftsman” bungalow and the home of John and Grace Hudson, is the single largest artifact in the museum's collection. It is California Landmark #926 and is listed in the National Register of Historic Places. The museum holds close to 1,000 ethnographic artifacts, primarily created by Pomo Indians and collected by John Hudson, including an important corpus of Pomo basketry. The museum also contains some 50 unpublished field notebooks, produced by John Hudson, preserving a wealth of linguistic, historic, and cultural information recorded among nearly 3/4 of California's Indian peoples, particularly the Pomo. The manuscript collection occupies some 31 linear feet of shelf space. It contains Helen Carpenter's previously mentioned unpublished “Be-Lo-Ki” manuscript, as well as an 800 page manuscript on “traditional” Pomo culture and a 500 page dictionary of the Northern Pomo language, both authored by John Hudson and both also unpublished. The museum's correspondence collection, primarily consisting of letters to John and Grace Hudson, is an eclectic one. Approximately 11 linear feet in size, it contains letters from family friends (such as artist Virgil Williams, botanist Luther Burbank, and suffragette Susan B. Anthony), collectors of Hudson paintings (such as actress Janet Gaynor), and many prominent American anthropologists (including Otis Mason, John Harrington, and George Dorsey). The Hudson Museum contains over 6,000 historic photographs and glass plate negatives, the majority taken by A. O. Carpenter. These contain significant visual documentation of Mendocino County in the late 19th and early 20th centuries, especially Pomo individuals and communities, as well as Hudson-Carpenter family members. The museum holds over 700 art works in oil, pencil, pen-and-ink, and watercolor. The majority are by Grace Hudson, including many of her early student pieces and preparatory sketches. The museum actively collects Grace Hudson's work through solicitation of donations, and now holds the world's largest number of her individually-numbered, copyrighted oil portraits. The Hudson-Carpenter family's library, consisting of over 1,300 volumes (18th-20th c.), is also in the Museum's holdings. It includes numerous signed first editions by family friend, Jack London, and important early anthropological texts annotated by Dr. Hudson. Finally, the Museum houses over 5,000 assorted family possessions, among them furniture, clothing, and accessories.

The Hudson Museum collections remain unique in their total inter-relatedness, providing great research and interpretive depth. For example, a Pomo basket in the collection can be linked to a photograph of its maker taken by A. O. Carpenter, samples of basket materials gathered by John Hudson and descriptions of weaving techniques recorded in his notebooks, remembrances of the weaver's family written by Helen Carpenter, and a Grace Hudson painting depicting the basket in the dowry riches piled at the feet of a Pomo bride. As outlined in the Museum's statement of purpose, the scope and

interdisciplinary emphases of its collections direct, orient, and provide a primary basis for the museum's exhibits and programs. The documentation and preservation of these significant collections have been, and will continue to be, one of the Museum's first priorities.

## **2. What is the significance of the collections to the museum's community and constituents?**

The Hudson Museum's collections, since they have become accessible as a public trust, are significant to a variety of communities and constituents locally, regionally, and nationally. Because members of the Hudson-Carpenter family played important roles in shaping and recording regional history through their public service, teaching, writing, publishing, and photographing, the collections are a rich source of information for those interested in the early history of California's North Coast. The talented, strong, professional women of the Carpenter-Hudson family attract scholars in women's studies, art, art history, literature, and Western history, to the Museum's resources which document their lives and work.

The Museum's collections provide a unique and intimate record of Pomo Indians during the early 20th century. Contrary to the Hudsons' expectations, Pomo peoples did not vanish but remain today as an important part of the community, representing a sophisticated, resilient, and tenacious culture. Historic changes in Pomo life since the Hudsons' lifetime augment the value of these collections which, unlike many such ethnographic collections, have remained in their place of origin. They now serve this local constituency as a primary resource for cultural revitalization and strengthened ethnic and family identity.

Students of California Indian studies and early American anthropology, along with members of numerous California tribes, are interested in John Hudson's work because it is some of the earliest detailed, systematic ethnographic material recorded about Native California. Since Hudson published little during his lifetime, the bulk of his papers remained hidden away in his estate and were unavailable until it became a public trust. This material is currently the subject of a \$61,000 National Science Foundation "Systematic Anthropological Collections" program grant which will correlate, annotate, index, and cross-reference Hudson's ethnographic papers and photographs. This information will be entered onto a computer data base, while the papers and photographs will be microfilmed. The project's ultimate aim is to make these materials widely available to interested users, including California Indian communities, scholars everywhere, and institutions across the nation with related collections, through the use of both microfilm and CD-ROM technology.

## Exhibitions

**1. Supporting the Statement of Purpose:** Galleries and exhibitions represent our principal resources for presenting information about science and technology and engaging visitors in the exploration of science processes. They are often the starting point for stimulating *interest*, as well as an ongoing tool for promoting more in-depth *understanding* of science and technology, both of which are key aspects of our Mission. At the SLSC, exhibit and program development is fully integrated, with exhibits providing the content underpinnings for programs.

Our exhibition philosophy is based on the premise that the most effective means of learning is by doing. We create visitor-centered learning environments that offer modeling of the inquiry process, “co-investigation” of scientific processes by visitors and staff, authentic tasks using real data, up-to-date content information, examples of real-world applications of science and technology - and a spirit of fun, discovery and surprise.

The SLSC features more than 650 exhibits in 11 galleries, each of which has its own story line and a multi-disciplinary perspective. Our exhibition areas include: Ecology and Environment Past, Present and Future (three related galleries that show how man and nature have changed the region's environment over time); Human Adventure (illustrates man's physical and cultural traits); Aviation (focuses on the basic principles of flight); Infomachines (information & technology); Structures (explains the basics of structural design); DNA Zone (a newly redesigned gallery that focuses on genetics/biotechnology); MedTech (addresses medical technology and human health); Space and Popular Culture (shows how pop culture has influenced our views about space); Space Xploration (focuses on the basics of astronomy and space travel); Monsanto Science Park (an outdoor physics playground); and the Discovery Room (for families with young children) and the Exploradome which houses major traveling exhibitions and affords program and meeting space.

The SLSC relies heavily on input from our audiences to help determine exhibition topics and design. For example, three front-end evaluation studies of our new information technology gallery, Cyberville, have been used by the design team to understand visitors' existing knowledge in the area and to select a useful gallery theme. The first study, conducted in 1996 utilized concept maps and qualitative interviews to provide a portrait of how adults and children organize their conceptions of computers and technology. Focus groups conducted with fifth, seventh and eighth graders, teachers, adults, and seniors helped the design team select the organizing theme of a village/small city and the name Cyberville. In 1997 and 1998, two surveys were conducted that measured the change in visitor computer expertise, access, and ownership between the two years. Our visitors were found to have much higher levels of ownership and access than the general public, but over 30% still had no access to computers. Currently individual exhibits are being tested and revised based on visitor response in our dedicated prototyping area, *Exhibitworks*. after the gallery is open for a year, a summative evaluation will be conducted to assess the impact of the Cyberville experience on visitors' understanding of information technology. The SLSC's recently formed Teacher Partnership Board (a 16-member group of certified teachers) applies their expertise to the development of student and teacher programs within the gallery. This audience-centered model is used for all our major gallery redesigns and improvements.

An exhibition's message is discovered principally through the visitor's active inquiry. At least two-thirds of the SLSC's exhibits invite such participation through easy-to-use computers, mechanical devices and multimedia. A closer look at one of our galleries, Ecology and Environment Past, illustrates the wide variety of interpretative techniques in use at the SLSC. In this gallery, visitors encounter huge, animated replicas of a T-Rex and a triceratops; interactive touch-screen videos that address how earth has changed over time; colorful dioramas that capture the wonders of the Mississippian and Pennsylvanian epochs; hands-on manipulatives that illustrate fossil formation; tools of hunter-gatherers on display from our collections; and a stream table that permits staff-visitor interaction and inquiry. The gallery experience is made more personal through gallery cart demonstrations, 10-minute “Amazing Science Demonstrations” and “Scientists at the Center” programs (small-group encounters with area scientists held two to three times per month). An Internet station, providing visitors with access to real-time data and environment-related web sites opened in 1998.

**2. Development and Evaluation:** The Education, Exhibits & Programs Division (EE&P) is responsible for developing new exhibition projects, which are firmly grounded in the SLSC's Mission. The strategic plan clearly delineates which galleries are slated for major renovation over the next five years, as well as those scheduled for systematic updates every other year. Working from this plan, individual gallery directors present preliminary exhibition concepts to the Vice President of EE&P. She, in turn, presents them to the other members of the SLSC's Senior Management Team (President, Executive Vice President of Operations, Vice Presidents of Development and Finance, Sr. Director for Marketing/Community Relations). If approval to proceed is given, the gallery director assembles an exhibit design team to further refine the concept and manage

the project to completion. In addition to the gallery director, these teams typically include a gallery program manager, at least one Research & Evaluation staff member, gallery assistant, exhibit and graphic designers, the Evaluation & Assessment Director, a representative of the SLSC's Teacher Partnership Board, and an outside advisory team member. The Vice President of Education, Exhibits & Programs provides oversight for the exhibit design teams. Conducting front-end evaluation, formative evaluation (including prototyping), and field tests as a gallery opens and summative and remedial evaluations are part of the standard operating procedure.

In accord with the strategic plan, two major traveling exhibits are offered annually with program planning to support community use. Traveling exhibitions are chosen in light of their relevance to the Mission, the significance of their subject matter, their relationship to permanent exhibitions, and their appeal to local audiences. In 1998 alone, SLSC's traveling and special exhibits served over 342,500 visitors. A staff committee co-chaired by the Vice President of Exhibits, Education & Programs and the Executive Vice President of Operations establishes goals and objectives and identifies an implementation team. In preparation for a traveling exhibition in the Exploradome, the SLSC assembles a 15-member, cross-departmental implementation team. We believe this comprehensive, institution-wide approach will help ensure the success of the exhibitions in fulfillment of the Mission.

Excluding traveling exhibitions, about 650 exhibit units are “on the floor” at any time - and more than 400 have electronic, computer, media or interactive parts. The SLSC's exhibit maintenance goal is to have a minimum of 97% of exhibits in full operating order for the public at any given time. Of the 362 days that we were open in 1998, we dropped below 97% only once- to 96.7%. We exceeded the goal on 358 days (on six of those days 100% of the exhibits worked). This is one of the **most impressive** exhibit maintenance rates among science centers in the U.S.

As evidence of its dedication to constantly improving the visitor experience, the SLSC has a Research & Evaluation Department with three FTstaff who develop and implement front-end, formative and summative evaluations. Multiple methods are used to assess the impact of a gallery, including, but not limited to: 1) gallery tracking studies that capture the pathways visitors use throughout a gallery; 2) structured and unstructured gallery observations to describe group interaction and use of specific exhibits; 3) interviews to assess visitor knowledge, attitudes and perceptions; and, 4) biennial in-depth evaluation of every gallery. The SLSC also engages in exhibit prototyping. Findings from evaluation and prototyping become part of the working knowledge of the project teams, pointing to successful techniques and prompting changes and experimentation.

## Exhibitions

### 1. How do the Museum's Exhibitions Support the Statement of Purpose?

The primary philosophy guiding use, development and design of exhibitions is to encourage the visitor to come and enjoy the natural resources and cultural heritage of the American River Parkway and the Sacramento region and to offer tools and information for further study. The goals for exhibitions are 1) to stimulate visitor participation in their own learning process, 2) introduce visitors to the habitats and interrelationships they may experience in the American River Parkway, and 3) to provide visitors first-hand information about high interest topics.

Nature Center user surveys show that visitors expect to “interact” with the Parkway or to experience something beyond their classrooms or jobs. Over half visit for an educational experience. Nature Center exhibits, combined with a nature walk or investigation of the Maidu Cultural Demonstration Area, satisfy these needs and fulfill the Nature Center mission.

Since the majority of the Nature Center's drop-in visitors are families with children, it is appropriate that most of the exhibits encourage active participation through smelling, listening, touching, pushing a button, opening a flap, answering a question, and using imagination. Live animal exhibits have glass and natural wood exteriors with background murals showing features of the animal's natural habitat. The 77 acre Nature Area, with 3 self-guided trails, is a valuable “living exhibit” and represents a sample of the oak woodland and riparian habitat which extended for miles on both sides of the American River in the early 1800's. Another outdoor exhibit, the Maidu Indian Cultural Demonstration Area, consists of two tule huts, an acorn granary, fire and leaching pits, shade shelters, a bedrock mortar and exterior porcelain panels with artwork and text interpreting the site.

Development of permanent exhibits is guided by the Nature Center's Exhibit Plan and overall “River of Life” theme which interprets the flora fauna and cultural history of the American River Parkway. Changing exhibits stimulate new interest, provide current information, and are constructed to withstand heavy use. All permanent and short-term exhibits are built with a modular-type construction that can be combined with new modules and other exhibits, maintaining the flexibility of exhibit floor space. During the actual development of primary exhibit concepts, outside involvement from a variety of sources is solicited such as: county staff, resource specialists, university staff, and various community members as well as input from the public through surveys, formative evaluations and by suggestions to staff and volunteers.

Exhibitions are designed with the differing learning styles, interests, physical abilities, and developmental stages of children, families, youth, seniors, and people with disabilities in mind. “Hands-on,” physical involvement is an important part of Nature Center exhibits - making them suitable for children, the Nature Center's primary users.

Exhibit designs that accommodate special needs include bench seating in several locations throughout the outdoor exhibits, chairs that are available for rest in the Discovery Room, computer stands, door clearances and wide entry ways that accommodate people in wheelchairs, no stairs or thresholds to negotiate in the Discovery Room, hands-on exhibit components within reach of a person in a wheelchair, well-lit exhibit panels with large easy-to-read text type, and exhibits modules that involve all the senses.

Naturalists and Docents use costumes, storytelling, dramatizations, role playing, talks with props, guided imagery, puppets and live animals to introduce the exhibit theme during presentations and are available to answer questions and interact with groups during informal exhibit exploration.

### 2. How are Exhibitions Developed and Evaluated?

Timely issues related to conservation, science, cultural history, and the California State Department of Education's Science Framework guide the development of exhibition topics. The Exhibits Director discusses topics with teachers, museum visitors, the ARNHA board, ARNHA members, staff naturalists, volunteers, cultural history specialists, and the Nature Center Director. Consensus is achieved on exhibition topics which are most relevant to our audience, changing community needs, and the Nature Center's mission and topics for changing exhibits are chosen a few years in advance.

Exhibition development follows several steps. First the exhibition topic is researched, main concepts and subtopics are refined, a floor plan is developed, and designs of various components are created by the exhibit team with input from the Nature Center Director and staff during open meetings and discussions. Before construction begins, preliminary plans for the

exhibition are presented to the ARNHA Board of Directors, the Parks Director and the Nature Center Director. Monthly reports on exhibition development are made to the ARNHA Board, the Parks Director and the Nature Center Director.

"A Salute to Songbirds" exhibition was created and built by the Nature Center to bring about a greater awareness of the plight of migrating songbirds. This exhibition opened in February 1997 and will run through June 1999 after which it will be marketed to other museums for a 3 year tour. The topic of declining songbird populations objectifies the conservation education goals of the Nature Center because of the Center's location in a riparian woodland, which is crucial songbird habitat. We were assisted in the funding of this exhibition by private foundations and members of the governmental agencies associated with Partners in Flight and Riparian Habitat Joint Venture.

A formative evaluation was conducted of Nature Center visitors to learn where most of our visitors get their information about songbirds (media, books, TV, etc.) and what possible misunderstanding or misinformation they had. Information gathered from formative evaluations shaped key exhibit concepts such as what people can do to help songbirds survive. An exit survey completed by visitors showed that 91% "learned things [they] didn't know before", and believed that "most people would find the exhibit interesting and educational." 87% would return to see the exhibit again and 94% believed "this type of exhibit can help to preserve songbird populations." 64% indicated that they would do at least one thing differently as a result of seeing the exhibit. From responses to the survey we found one component needed more information, which was added later.

All permanent and changing interior exhibits are maintained by the Exhibits Director, Exhibits Assistants, and volunteers. If an exhibit component is broken or out of order it is immediately removed from display and repaired. The trails in the Nature Area are maintained by the Landscape Manager and volunteers. The Maidu Indian Cultural Demonstration Area is maintained by the Naturalists that conduct the Maidu Cultural Heritage Program and volunteers. Live animals are maintained by the Animal Caretaker and volunteers.

The means for exhibit evaluation are built into exhibit planning. Exhibit objectives outline desired outcomes in visitor behaviors, feelings, knowledge, and attitudes. Visitor surveys are filled out by 40% of teachers and general museum visitors. Each teacher/group leader is given an evaluation with questions about the exhibits and areas for comments. Each completed evaluation is reviewed by the Nature Center Director, Exhibit Director and Education Director. Visitors often leave comments or suggestions for exhibits with the Receptionist or Naturalist on duty. These are passed on to the Exhibits Director and incorporated into planning or repair schedules as appropriate. Visitors consistently rate the Nature Center exhibits as "good" to "excellent."

## Management and Care (Collecting)

### 1. What are the museum's policies for the responsible care and management of collections?

NCBG formulated a comprehensive Collections Policy based on the Living Plant Collections Policy Guidelines of the Plant Collections Committee of AABGA. This policy establishes standards and procedures for acquisition, plant records, inventory, care, and receipt of gifts, loans, deaccession, and disposal. The policy defines the information to be kept in each accession record, sets ethical standards, and gives priorities for care and use of resources during emergency situations. Criteria in the Collections Policy for deaccession and disposal include lack of value for the mission, declining health or appearance, hazardous condition, and invasiveness of exotic species. NCBG adheres to a strict conservation policy for plant acquisition. Native plants used for display, distribution, landscaping, and workshops are propagated by the staff, purchased from nurseries that propagate native plants, or acquired through plant rescue in areas scheduled for immediate destruction. Because of its conservation emphasis, NCBG seeks to eliminate the release of invasive pest species and has adopted risk assessment and distribution policies to meet conservation objectives. The Collections Policy is periodically reviewed by staff and approved by the Administrative Board.

As plants or propagules are added to the collections, standard information is recorded in the accession log and transferred to the plant records database (converted to BGBase in 1998) when the accession is made part of the permanent collection. During this process, aluminum labels are imprinted with family, scientific and common name, accession number, source, and 2 lines of interpretive information. The label remains with the plant during its lifetime at NCBG. A *Catalog of Permanent Plant Accessions* is printed annually for use by staff and visitors, with a duplicate kept in the UNC Biology Library. Rapid retrieval of information renders collections more valuable for research, education and conservation. 5,180 living accessions and over 6,000 metal labels have been completed. 98% of the collections of our display area have been accessioned and added to the database. The records are updated annually to incorporate new accessions and to reflect the annual inventory and condition assessment completed by Curators. Two sets of backup copies are stored offsite. We use a battery power backup for proper shutdown in case of power failure. BGBase has a security system that controls read/write permissions. Original handwritten copies of collection information are copied and stored at the Garden and on Campus. The plant collections are vouchered by specimens stored at NCBG and the UNC Herbarium. To prevent pest outbreaks, specimens are frozen for 60 days every 2 years. Label data are also computerized for rapid retrieval of information on location, blooming and fruiting dates, and for use in propagation, seed collection, research, and public education. The inventory of seeds and spores is computerized for annual preparation of the *Index Seminum et Sporarum*. In 1998, we instituted a policy to geographically restrict seed distribution to lessen the risk of spreading invasive species to other parts of the country and world.

The 1988 Mission Report and 1990 Master Plan established policies for developing and implementing conservation plans for living collections, including the active conservation of natural areas and adjacent buffer lands. Natural areas are inventoried and managed as collections of the NCBG. Natural area acquisition is governed by policies adopted by the Conservation Committee and submitted by the Director to the Board. Areas for acquisition must possess exceptional value for conservation. Natural area use and management is governed by management plans drafted by curators working with local stewardship committees and submitted for approval by the Director and the Board. Plans are reviewed and revised at regular intervals. Information on appropriate use is presented on signs and in brochures. For Mason Farm Biological Reserve, a permit system provides an additional means for informing users of Reserve policies and collecting research reports. UNC faculty members, including a plant taxonomist, plant and animal ecologists, and a horticulturist frequently consult with the staff and serve on advisory boards. At the Biological Reserve a mosaic of fields is maintained for ecological studies by mowing or plowing on a 2-6 year rotation.

With funding from IMLS Conservation Project awards we have written conservation plans for 12 collections: the Rare Plant Collection; Coker Arboretum (the computer map was updated in 1998); the Hunt Arboretum; Mason Farm Biological Reserve; the Coker Pinetum; Nature Trails; Stillhouse Bottom; and 5 of 7 outlying nature preserves. Horticultural care of the living plant collections is a top staff priority. Plants are matched to site to minimize the need for care. Several thousand container-grown specimens in the nursery facilities are inspected daily. Recent addition of automatic irrigation systems in the Herb Garden, the Garden Commons displays, the Mountain Habitat, the Shade Garden, and nursery facilities has greatly facilitated care of the collections. Curators have completed detailed maintenance schedules for each collection to serve as guides for ongoing work. These will be reviewed and updated annually. We are committed to integrated pest management (IPM). Staff members have attended IPM workshops and recruit volunteers for weeding and removing harmful insects. Weed control in the Habitat Collections requires taxonomic experience to distinguish species appropriate for each Habitat. The Curators and trained volunteers accomplish this task. Fire is used during late winter in the Coastal Plain and

Sandhills Collections to prevent woody plant invasion, to benefit fire-adapted species, and for interpretation of the natural role of fire in these habitats.

The Garden inventories, monitors, interprets, and maintains historic resources: the Paul Green Cabin, the Mason and Morgan Family Cemetery, and several sites of archaeological importance (e.g., Native American sites and the homesite of the first European settler in Chapel Hill). A new archaeological survey and inventory of the Mason and Morgan Cemetery will be completed in 1999 with funding from UNC.

## **2. How are the collections used?**

Almost all (98% as defined by accessions) of the collections, including natural areas, are living interpretive exhibits and are used for public education and enjoyment, university teaching and research. This use is enhanced by permanent and seasonal interpretive signs, labels, brochures, and by a What's in Bloom exhibit (changed weekly), presenting labeled specimens of species in flower or otherwise of interest. The display collections and nature trails are extensively used as an outdoor classroom by public schools, other groups, and University classes.

Some collections (0.5%) are maintained as container specimens for classroom use. These specimens include a variety of carnivorous plants, ferns, rare species, and species of other botanical interest. These collections are used in the Visiting Plant program, an inquiry-based instructional activity that provides living plants for weeklong classroom activities in science and social studies.

About 1% of the collection, including substantial holdings of carnivorous and rare plants, is maintained in subirrigation beds or other nursery facilities for teaching, research, propagation, and reintroduction. Staff propagation efforts provide plant material for research by staff, faculty, nurseries and other horticultural institutions. Poison and medicinal plant collections are used for reference by poison control centers, the NCSU Veterinary Science, training programs of the UNC Hospitals, and the public.

NCBG staff members carry out and facilitate research by UNC faculty and students and other universities. NCBG research addresses native plant propagation for home gardening and landscaping, rare species conservation, plant ecology, natural area conservation, ethnobotany, and plant systematics. Natural areas provide important long-term research sites. 29 faculty and student projects are underway at the Garden. Work at the Biological Reserve has produced 26 PhD, 7 MS, and 11 undergraduate theses and over 100 publications. The detailed breeding bird census at the Reserve is the longest running project of its kind in the Southeast and will help us understand the effects of forest fragmentation on bird populations. Research at the Reserve, described in a recent article in *NC Wildlife*, also focuses on forest succession. Permanent plots established in 1990-92 were invaluable for the study of the effects of Hurricane Fran (1996). In 1996, the site was adopted as the only southeastern site in a global network for the study of wood decomposition and the global carbon cycle. NCBG and the UNC Herbarium joined forces in 1994 on a project to produce a new state checklist and atlas of plant distribution. Our work to document the flora of NCBG has allowed us to identify and protect rare species populations and to design appropriate management plans for natural areas. The Biota of North America Project maintains a database on the vascular plants of North America for The Nature Conservancy and several federal agencies, available online in the USDA PLANTS database. The culmination of 15 years research by the staff was the publication *Growing and Propagating Wild Flowers* (UNC Press, 1985). Results are also disseminated in the NC Association of Nurserymen's *Nursery Notes*, the *Carolina Gardener* (2-4 articles per year), other printed outlets (e.g., a coming issue of *Fine Gardening* and *The Brooklyn Botanic Garden Gardener's Desk Reference*), and conferences (e.g., the annual Conference on Landscaping with Native Plants). This work demonstrates the alternatives to collecting from the wild. A decade of study and practice in the use of the collections by special populations culminated in the publication of *Growing with Gardening*, an award-winning training manual (UNC Press, 1992). Recent articles in the *Carolina Alumni Review* featured research at Mason Farm and other Garden programs and improvements. Research projects are also interpreted by staff and tour guides.

## Management and Care (Collecting)

### Collections Management

**AMOA adheres to written policies** ("The Policies and Practices of The Amarillo Museum of Art With Respect to the Acquisition and Disposition of Collections Material") adopted by the Board in 1979 and reviewed annually by the Collections and Policies Committees. These policies were reviewed by AAM's accreditation team in 1979 and were noted for excellence by AAM's 1987 re-accreditation team. A major revision of these policies was completed in 1997 due to a significant gift of Asian art objects which altered the composition of the Collections and AMOA's types of conservation concerns. The Consulting Curators of Asian Art and conservators from CARRABA in Austin, Texas assisted in these revisions as well as having completed a twelve month conservation assessment of the Collections and the development of a conservation treatment plan. **The policies' most basic premise is that AMOA must be able to store, protect, and preserve objects which are directly related to AMOA's mission and collecting scope according to acceptable museum standards.**

Acquisitions: Acquisitions are guided by the UNESCO Convention of 1970, and AMOA must obtain clear and irrevocable title to each work. Acceptance of works is initiated by the staff with input from the Collections Committee. The Director can refuse objects. The owner may have that decision reviewed by the Collections Committee which considers art proposed by the Director and makes recommendations to the Board. Objects are accepted by the Board before accessioning.

Cataloging and Documentation: Each object is given a number during cataloging by the Registrar who is highly trained in Collections care and is a frequent speaker at state and regional training workshops. AMOA has recently completed a 3-year effort to computerize all registration records (including accession, deaccession, conservation assessments and treatments, cross referenced fields related to artists, sources, and donors and so on) and is beginning the process of funding including digitized images of all objects in the computerized catalogue. In addition to computerized records, hard copy records on each object are filed by accession number and contain Board minutes of acceptance, warranty of title, condition reports, appraisal, source, photograph, and research information. These folders are stored in fire proof cabinets both on and off-site. Back ups of the computerized catalogue are made after each new acquisition or change to object records, and tape backups are stored off-site in AMOA's safety deposit box. Insurance, carried through a nationally recognized underwriter, is revised annually as the collection grows and raised temporarily as appropriate to care for items on loan. Object valuations are made periodically so that coverage reflects current value. An annual inventory and visual inspection of the collection is undertaken each August.

Deaccessioning: Objects can be deaccessioned only with Board approval upon recommendation by the Director and Collections Committee following criteria recorded in the formal policy. Objects must be sold publicly through auction with proceeds reapplied to acquisitions. The original donor is credited when new purchases are made.

Loans: The Director can loan objects to other art institutions for exhibition and for study. There is a formal policy and process for loan requests which includes facilities reports, loan agreements, proof of insurance, and a statement as to how the work is to be used to insure that such use corresponds to AMOA's own statement of purpose. Many AMOA exhibits are borrowed from other institutions, artists, collections, and galleries; complete records of uncrating, condition reports, installation, removal, repacking, and reshipping are kept. AMOA has a strong reputation for its documentation/ handling of works on loan.

## USE OF COLLECTIONS

AMOA's primary role in the community is education, and its 100% of its collections are used for the education of the public by means of exhibition, research, and loan. 80% of it is available for loan; AMOA responds to an average of twelve loan requests yearly. Exhibitions from AMOA's permanent collections are available for tour to other museums, and AMOA makes such exhibitions available at minimal rates to museums in the Texas panhandle. One of AMOA's 6 galleries annually hosts eight exhibitions from the collection; these exhibitions educate the public regarding a particular aspect of art or show the relationship between works from the collection and works in concurrent temporary exhibitions. Gallery handouts are prepared for exhibitions from the permanent collection to enhance public understanding of the pieces on display. Slides of works in the collection are used in AMOA's extensive outreach programs. **The Permanent Collection is open to scholars by appointment for the purposes of research and study and is frequently used by AMOA's staff in research related to exhibit topics.**

## Care and Conservation

**AMOA has both Conservation and Long Range Plans in place for its collection.** These were thoroughly revised in the fall of 1997 with the assistance of AMOA's consulting curators and consultants from the conservation firm of CARRABA in Austin, Texas. Due to the quality of the facilities and the emphasis placed on care and handling, only one object has ever had to be referred for conservation treatment in the museum's history due to on-site issues. New accessions are evaluated and treated before placement in the permanent collection storage. A recent 12-month conservation assessment of the collections was completed which resulted in a conservation plan for the collections and the acquisition of \$50,000 in gifts towards the improvement of storage and care facilities. These improvements include new textile and sculpture storage racks custom built to meet consulting conservator specifications, upgrading of all environmental monitoring systems, and increased security controls.

Environmental Care: Light levels are controlled for all objects on display and are monitored by light meters. Second floor galleries have incandescent track lighting fixtures which can adjust light levels for the most fragile objects. Atrium/third floor galleries have U/V filtered fluorescent lighting in ceiling tracks which are used only during installations. Windows, glass doors, and the atrium have ultraviolet filters. Window light is controlled by vertical blinds. An environmental system controls the temperature (70 F +/- 2 degrees range) and humidity (50% +/- 2% range). Thermohygrograph records and digital environmental records are kept for all galleries and storage areas, and these systems are monitored 24 hours a day by AMOA and College staff. In 1997/8, a new state-of-the-art system which meets consulting conservator specs for air filtration and environmental variations was installed. Preparation for the HVAC upgrade included the replacement of exterior doors, windows, and airlocks for public entrances. For further information on environmental controls, please see *Section VI, Physical Facilities and Security*.

Art Handling: AMOA is a leader to museums in our region with regards to the proper care and handling of art. **The Registrar consults on art handling and has published a guide on the topic which is frequently requested as a training manual.** Art is handled by the staff and well trained part-time preparators under the supervision of the Registrar. The training, conducted by the Director and the Registrar, includes films, lectures on risk management and installation techniques, supervised hands-on practice, and apprenticeship.

Storage Care: Objects not on exhibit are housed in a controlled access vault and vault annex which are secure against weather related disasters and are protected by motion, door contact, moisture, and environmental detectors. The vault facility is divided into specific use areas and includes conservator designed storage furniture (stainless steel sliding racks for framed works, specialized textile rolls for Asian textiles, foam padded steel shelving for sculptures, etc.). Sculpture and unframed works are shelved behind locked gates. All works of art on paper are stored in Solander boxes. The vault has a large work table and open shelves for tools, art board, blotter papers, framing supplies, and conservation materials. Temporary exhibits are uncrated either in the receiving room adjacent to the entry ramp (which is also protected by motion and moisture detectors) or in the vault annex.

Preservation, Examination, Treatment: Condition reports are made during an annual inventory. Cleaning, mounting, matting, and framing are done by trained staff and the Registrar. CARRABA Co. consults on the conservation of the collection. Problems are treated as they are discovered. Condition reports are completed on all works on loan coming in and going out. Outdoor sculptures are included in the annual inventory and conservation efforts, and all exterior art objects are conditioned annually as is appropriate to the medium of each particular piece.

Disaster Plan: **AMOA's disaster plan is coordinated with the College's Public Safety Office. Although the primary potential disaster in this area is from tornadoes, the plan addresses a full range of other events including evacuation and response to fire emergency procedures, theft and vandalism incidents, and bomb threats.** The plan prioritizes the assets by category (irreplaceable, needing special protection, relatively easily replaced, etc.) and the personnel available to remove items from the building and safely off-site. The plan is revised as needed in collaboration with the college, and staff participate in an annual training. *For more information on AMOA's disaster plan, please see Section VII.*

**Management and Care (Non-Collecting)**

The Photographic Resource Center is a non-collecting institution that emphasizes new work, ideas, and methods in photography. The PRC ensures that its exhibitions best serve its purpose through an ongoing internal dialogue on the alignment of programs to mission and the relevance of its mission to the field, and through external evaluation and regular qualitative and quantitative research of member and non-member audiences. In formulating exhibition management policy, the Director and Board pay close attention to the limitations of the gallery and the capacity of PRC staff. The decision to present a work of art is based as much on its appropriateness to an exhibit as to the PRC's ability to properly care for it.

PRC exhibitions consist of works of art loaned by artists, dealers and collectors, and other institutions, as well as site specific installations. Works loaned to the PRC are treated according to standard museum practices. A loan contract is used to delineate the responsibilities of the parties involved. Information requested by the form includes: lender's name, address, phone, desired attribution and signature, artists' name, title, date of work, medium, dimensions, condition, insurance value, selling price, permission to reproduce, and special instructions. Information for wall labels is drawn from loan forms, including artist's name, title, date, medium, lender if other than the artist, and residence when appropriate. A curatorial statement is prepared along with an acknowledgment panel recognizing support for exhibitions. A checklist and curatorial statements and artists' biographies and statements, are available in the gallery. The PRC newsletter, *In the Loupe*, presents descriptive and biographical material relating to exhibitions, and is distributed with membership information to all non-member visitors to the PRC.

Wall to wall insurance coverage is provided by underwriter Nordstern-Commercial Property (fine arts policy). This policy covers accidental damage, vandalism, theft, and fire, as well as damage in transit to or from the PRC. In its twenty years, the PRC has not been subject to theft or malicious damage. The PRC only contracts shipping companies experienced in art shipping. Specially built crates are purchased from Curatorial Assistance.

A Standard Facility Report from the American Association of Museums is used when renting exhibitions. For traveling exhibitions, a legal form delineating terms and liabilities is signed by both borrower and lender. Accompanying the borrower's copy of the contract for a traveling exhibition are a checklist, packing and unpacking instructions, receipt forms, and condition form reports. Installation photographs are taken of every exhibition. Loan forms, shipping forms, condition reports, packing reports, catalogue materials, and photographic documentation become part of the exhibition's permanent files available in the PRC library.

The PRC's Director of Exhibitions handles registration of all work loaned to the PRC. Before coming to the PRC she was Exhibitions Coordinator for the American Federation of Arts, NY, and is uniquely qualified in curatorial and registrarial issues. She is responsible for recording the entry and departure of works of art, for packing and unpacking all exhibits, and for daily inspection of the galleries. Since all galleries are rotated on the same schedule, packing and unpacking occurs when the PRC is closed to the public, ensuring maximum safety and security for incoming and outgoing exhibits. The PRC maintains a close relationship with the staff of the Department of Prints, Drawings, and Photographs at the Museum of Fine Arts, Boston, to whom it refers in the rare event that conservation of an exhibition is required. PRC staff also enjoy the support and advice of numerous area professionals and institutions when advice is needed on curatorial and museum practices.

Exhibitions are stored and prepared in separate, secure work and storage spaces. In general, the PRC stores exhibits for no longer than two weeks prior to and two weeks following any exhibition. The public is not permitted in the preparation and storage spaces, and doors leading to them are locked securely. Motion detectors and PRC staff routinely survey the work space, storage area, and exhibition spaces. The PRC's galleries are lit by low voltage track lighting fixtures which minimize risk to objects; lower wattage lighting is used to illuminate historical or color photographs. There is no direct natural lighting in the galleries. Building temperature and relative humidity are regulated by a central heating and air exchange system that is maintained by Boston University. Fire extinguishers are located throughout the gallery storage and office areas and are inspected regularly by Boston University building engineers. Heat and smoke detectors are located throughout the facility, and are connected directly to the University's police dispatcher's office.

The PRC was founded to be an integral part of the New England artistic community. Of its exhibitions, the *New England Biennial* is a critical examination of the "state of the art" of contemporary photography within a large and artistically important regional community. Since it was conceptualized in 1990, the *Biennial* has been the centerpiece of the PRC's regional programming, enormously popular with artists and audiences alike, and has been underwritten by sources as diverse

as the National Endowment for the Arts, the Giorgio Armani Foundation, and the Englehard Family Foundation. Other exemplary exhibitions that have addressed the specialized interests of the PRC's regional audiences include: *Assimilation/Isolation* (1992), which examined the cultural assimilation of refugees and isolation of minorities in the United States, and focused on issues related to the large communities of refugees living in Massachusetts; *People of the First Light* (1993), a photographic history of the native Wampanoag People of Massachusetts and *Shadowy Evidence: Edward Curtis and His Contemporaries* (1995), a reexamination of the early 20th century photographic documentation of Native cultures, both of which involved collaboration between the PRC and New England's native communities; *Between Spectacle and Silence: The Holocaust in Contemporary Photography* (1995) which involved extensive collaboration between the PRC and its co-sponsors (the Boston University Center for Judaic Studies and the Facing History and Ourselves National Foundation), local high schools and universities, and Jewish community groups for a three day symposium involving artists, scholars, Holocaust survivors, and others from across the United States; and *Facing Death: Photographs from Cambodia's Killing Fields* (1997), which brought the PRC together with Massachusetts' community of Cambodian refugees, the second largest in the United States.

The PRC's primary research facility, the Aaron Siskind Library, houses over 3,500 photographic books and 80 periodicals from around the world. The Library also houses a growing collection of artists' books, exhibition catalogues, and biographical files, a slide registry of works by PRC members, and audio and/or video documentation of all PRC lectures and gallery talks. PRC staff research includes studio visits, publication review, attendance at regional and national professional conferences and events, and visits to other museums and libraries. Extensive research is used to plan exhibitions, educational programs, and publications. The results of staff research are made available to the public through PRC publications, exhibition catalogues, exhibition handouts such as curatorial or artist statements, biographical sketches and bibliographies, and through wall texts accompanying exhibitions. Recent PRC publications include catalogues for *Recollecting a Culture: Photography and the Evolution of a Socialist Aesthetic in East Germany* (1999) and *The Land of Paradox: Contemporary Japanese Landscape Photography* (1996); brochures have accompanied most exhibitions since 1997. PRC publications are distributed to individual and institutional members, and to a list of more than 100 research libraries and photographic organizations world-wide. Catalogues are available for sale to the public in the gallery and through appropriate retailers of photographic books.

## Education

### 1. How do the museum's education programs support the statement of purpose?

The Museum places a visitor-centered learning experience at the heart of all its public services, and is highly regarded as a leading educational institution in the region. Its educational philosophy is to engage, inform and excite people of all ages and backgrounds about the art and history of the Lyme region, specifically the Lyme Art Colony and the Griswold House. To accomplish this, FGM offers both traditional educational programming and innovative interpretive initiatives, designed to offer a multitude of cultural and intellectual perspectives, allowing visitors to share in the spirit of camaraderie, discovery, and creativity inherent in an artist colony. FGM's educational programs support the mission by interpreting and animating the collections, architectural holdings, surrounding landscape, and gardens to an ever-growing public, through guided tours of the historic areas, artist demonstrations, theatrical interpretations, lectures, workshops, and classes. Programming also enhances the exhibitions through tours, special labeling, interactive storytelling, curator talks, and related demonstrations.

Currently, the Education Department is experiencing tremendous growth and vitality with the recent appointment of its first Director of Education and Outreach, an incoming Museum Educator, and new interns and education volunteers. FGM's dedication to educational programming is manifested in its new Hartman Education Center (opening 6/99). Designed as an exploratory, hands-on discovery space, comprised of an art studio/classroom and media center with an audio, video, and library loft, this new learning center will enable FGM to enhance the quality of its current programs as well as offer them year-round. Situated near the Museum, this central facility will be the location for educational programs that emphasize creativity, experimentation, and diversity--e.g. the multicultural Pixels & Palettes program in which fourth-grade students from urban, suburban, and rural schools are partnered for a series of interactive Museum visits with an emphasis on computers and art; a summer art and history camp; an art-after-school program; Saturday morning classes linking the current exhibitions with hands-on learning activities; drop-in discovery programs; theatrical performances, and more.

Other more traditional programs such as lectures, classes, workshops, and an 11-week docent training course, allow people who have a strong interest in the collections or the region's history to explore those interests in greater depth--e.g. an endowed annual lecture series presents prominent historians to share their current research. The educational programs attract new audiences each year through events targeted to under-served audiences including open houses that offer free admission, the town-wide Midsummer Arts Festival, teacher and educator workshops, age-specific programs, and other less-traditional new initiatives. Programs are designed for various age levels ranging from pre-school children through senior citizens, and are tailored to individual and group needs--e.g. *Little Pictures & Big Ears* is a new preschool program offered in collaboration with the local library throughout the year for children age 2-4 with their parent or guardian. Created in response to feedback from focus groups of parents with children, the young participants tour an exhibition, hear specially selected stories read by the librarian, and engage in a creative hands-on project relevant to the selected themes. Other new age-specific programming includes *Miss Florence's Art-Venture Camp* for ages 6-14 and *Storytelling for Adults* (ages 17 and up). An example of an initiative geared towards new audiences involves the commissioning of an original theatrical script and performance by a New York actor related to the history of the Lyme Art Colony and Florence Griswold. Teacher Workshops attract new educators to the facility, and are designed in collaboration with teachers to ensure they satisfy their interests as well as meet professional CEU requirements. Various adult programs are held off-site at senior centers and civic organizations to reach those who are unable to travel to the Museum. Special tours are scheduled several times a year for the physically challenged (adults and children), as well as tours for special interest groups. A staff member fluent in sign language is available to interpret tours for the hearing impaired. A script of the current tour is available in French, German, and Italian; and the Museum is working on scripts in additional languages. School programs are conducted both on-site and/or in the classroom, depending on the needs and resources of teachers. Programs are often held after school, during holiday and school vacations, as well as on weekends.

### 2. How are educational programs developed and evaluated?

**Program Development**• FGM places strong emphasis on the diverse interests and special needs of its visitors, and the visitor's own role in the learning process when developing programs. For instance, exhibitions encourage visitor response through a variety of gallery activities for both adults and children through interactive docent-guided tours, printed family guides with scavenger hunt activities, or special labeling--e.g. *First Impressions: Learning-to-Look Labels for the Younger Viewer*, interactive text labels that offer information and ask open-ended questions that are informed by visual thinking strategies and multiple intelligence theories. Docents who work with school-aged children are trained in response-based

interpretation methods. Program development is also based on current education and learning theories, AAM reports such as *Excellence and Equity*, AAM EdCOM's *Museums: Places of Learning*, and the Getty Museum's DBAE series.

**Outreach Efforts**• Programming is seen as a key strategy for overall outreach efforts and FGM is succeeding in building relationships with diverse audiences. FGM commissioned an independent study called *Building Bridges to New Audiences* ('98), a culmination of interviews and written questionnaires, that provides FGM with informed introductions to key members of a variety of diverse audiences, including insight to their different needs, interests, and perspectives. Being responsive to this information, FGM has hired its first Storyteller-in-Residence, to offer the public a non-museum voice and an alternative to traditional art interpretation. The storyteller will tell stories tied directly to the works of art on view in a new program, *Telling Visions: Alternative Art Interpretations through Storytelling*. The stories will also be available on cassette tapes for visitors not present during the performances, and will be used for a variety of outreach purposes. To our knowledge, FGM is the only museum to embark on such a program.

**Museum Programs** are developed and/or coordinated by the Director of Education and Outreach in consultation with other staff. Input is also sought from various committee members (Education, Membership, and Volunteer Council), program participants, and members of the community, often in the form of focus groups. FGM is involved in several collaborative programs with local and regional, cultural and educational institutions. For example, the annual *Midsummer Arts Festival* is a two-day, town-wide free event sponsored by local non-profit organizations in partnership with the business and media sectors. As host to a main portion of the festival, FGM invites cultural organizations from SE Connecticut to present their public programming to new audiences.

**School Programs** are developed by the Director of Education and Outreach; Museum Educator; Education Committee, a group of 30 trained volunteers who lead on-site programs; the Educators Council, regional educators who meet several times a year to explore FGM program possibilities in support of school curriculums and multicultural objectives. Teachers, school administrators, parents, and students are also consulted. Some examples are: *High School History Day*, a hands-on program for juniors developed with the local high school American Studies department; *LEAP into Painting!*, a summer camp for disadvantaged inner-city youths planned jointly with the organization it serves; *Beyond the Field Trip*, a hands-on art and history school program developed to meet specific curriculum requirements expressed by teachers; an innovative curriculum kit, *What's Your Impression?*, widely used by state educators to teach about Connecticut Impressionism (used both as pre-visit and by those classes unable to visit the Museum). Some additional children's programs include: *Florence's Field Days*, on-site, all-day, interdisciplinary programs for schools • *SmART Stuff to Do*, Saturday morning classes for children • *Family Days*, interactive activity days for families • *First Impression Tours for Families with Children* • *Internships* for high school, college and graduate students. Both *Florence's Field Days* and *What's Your Impression?* have received statewide awards for "their involvement of the local school system ... from conceptualization to implementation" and for "reaching a broader school audience."

**Program Evaluation:** FGM employs an ongoing evaluation process that encourages experimentation, reflection, and refinement. Programs are regularly reviewed through: 1) program participation questionnaires and evaluations, 2) visitor surveys, 3) teacher evaluation forms, 4) Education Committee analysis meetings, 5) staff discussions, 6) volunteer feedback meetings, 7) monthly "Docent Chats," 8) informal visitor comments, 9) key program evaluations by outside educators, humanities scholars, and professional colleagues, and 10) group tour evaluations. The Director of Education and Outreach has a professional interest in evaluative methodology and has attended special sessions related to program evaluation held by the New England Museum Association.

**Evaluation Results:** Program developers are committed to incorporating ongoing audience research and the results of program evaluation into the planning process. As a result, FGM is continuing to challenge itself to offer engaging learning opportunities that are more active, experiential, and self-directed. Strategically and purposefully, the entire design of the Hartman Education Center, from its use of theatrical lighting and ambient sound to the open storage of educational and creative materials, has been guided by an institutional belief that the spirit of camaraderie, discovery, and creativity inherent in an artist colony, can carry deep meaning and relevance for people of all ages and backgrounds. With this as a touchstone for new programs, FGM is positioned to contribute to the national dialogue of how people learn in museums today.

## Education

1) Clermont's educational programs must support the museum's *Statement of Purpose*, which in turn informs the *Interpretive Statement*, a document that outlines primary and secondary interpretive themes drawn from Clermont's unique history. Programs, like exhibits, are used to make Clermont's collections meaningful and instructive to a broad audience. The museum is committed to making the most effective and appropriate use of its resources--human, physical and financial--to provide quality educational services to its diverse audience. Recognition of limitations requires prioritization; Clermont cannot, and should not, attempt to be all things to all people. Landscape painting classes for example, could be given at Clermont, but are more appropriately offered at nearby *Olana*. Clermont, on the other hand, is a most appropriate location for a program developed in cooperation with the county historical society to teach middle school students about regional architecture ("Shelter to Showplace: Hudson Valley Architecture 1650-1900"). All education programs are grounded in scholarship. Information uncovered through staff research, or through the work of consultants, BHS archaeologists and curators, and outside scholars, is integrated into existing programs and frequently sparks ideas for new educational offerings. Educational programs are offered for children, adults, general audiences, and groups with specialized needs and interests. Audience characteristics are a major consideration in allocating programming resources. Clermont's largest audience (75-80%) consists of the regional "public" and tourists. This audience is served by guided tours of the historic house and gardens, exhibits, the horticultural interpreter, interpretive literature, and special events. Special interpretive events are developed to appeal to a broad audience, and therefore must be entertaining as well as educational. These events, based on themes drawn from Clermont's rich history, often incorporate costumed first-person interpretation. **Examples:** a character interpreter in the role of Margaret Beekman Livingston, Clermont's 18<sup>th</sup> century matriarch, relates her family's holiday customs during special school tours in December; four members of Clermont's domestic staff will discuss their differing perceptions of "freedom" and "liberty" during the museum's Independence Day celebration in 1999; and an International Festival in 1998 afforded visitors the opportunity to experience food, art, music and crafts of many of the countries visited by the Livingston family during their travels in the 18th and 19th centuries. Educational programs for children are developed to meet the needs of area schools, with particular attention paid to grades in which site resources match mandated NYS curriculum requirements. Since Clermont is an historic site, school programs emphasize themes introduced in the State's social studies curriculum. The museum focuses its resources on the 4th and 7th grades, which specifically address State and local history. Schools are encouraged, however, to integrate natural history, geography, art and art history lessons into their visit. **Example:** a three-day learning experience for 4<sup>th</sup> grades—"A Hudson Valley Family: The Livingstons of Clermont" -- explores generational change in the family and community. This program includes a site visit during which students seek out tangible evidence of historical change. Interpretive literature prepared by a consultant naturalist is included in pre-tour materials provided to assist teachers in incorporating the museum's "living collections" into their visit. The museum's 7<sup>th</sup> grade program, "The Livingstons of Clermont and the New Nation" is also influenced by NYS-mandated social studies curriculum.

2) Clermont's curator of education, working in partnership with the Interpretation Team, is responsible for the development, implementation, and evaluation of educational programs. The team includes the director, curator of collections, senior interpretive staff and representatives of the Board of the Friends of Clermont. The museum also involves consultants and local teachers in the planning process (and colleagues from collaborating museums when applicable). Implementation of new programs is a responsibility of the education curator, who normally works with small project teams comprised of permanent museum staff, seasonal interpreters, and volunteers. The Interpretation Team meets 2-3 times a year. Meeting agendas address planning, implementation, and evaluation issues. The needs and interests of Clermont's broad audience require diverse educational programs. The museum is vigilant in seeking out under-served, special needs audiences within its service area, and developing appropriate special needs programs. Groups with specialized interests (e.g. garden clubs, architectural historians) are offered guided tours by reservation year round that focus on Clermont's landscape, architecture, or collections. Community interest in local history, the Great Estates Region, historic preservation, landscape gardening, and antiques help shape Clermont's annual workshops, and lecture series. The museum's school outreach program was initiated in 1991, and a \$10,000 Legislative member item grant awarded in 1993 was used to enhance the program and enable the museum to pilot outreach programs in disadvantaged school districts at no cost. The grant also provided for the publication of teacher's resource manuals and duplication of packaged audio-visual materials. A fee is now charged for outreach programs, but most of the pilot schools continue to participate. In 1998 1,850 area school children participated in *Christmas Past: Holiday Traditions in the Hudson Valley*. This program, which utilizes character interpreters and hands-on activities, examines the changing ways in which the holiday season was celebrated at Clermont in circa 1790, 1880 and 1920. The program was expanded in 1998 to two full weeks in order to meet growing demand from schools and special needs audiences (a youth detention center, home school consortiums, and adult group homes). Two week-long "history day camps" (one for ages 8-11, the other for ages 11-14) are offered in the summer. The camps feature participatory activities based on Clermont's

interpretive themes. Six scholarships are granted to disadvantaged children, selected by their school, who wish to attend the camp. Adult and specialized audiences are served by the Spring Lecture Series (now in its 18th year), workshops, a Historic Gardens Symposium, bus trips, garden tours, guided “bird walks” and autumn hikes on the estate grounds with a consultant naturalist. Clermont and Bard College have collaborated on several academic conferences, including a symposium supported by a grant from the NYS Council on the Humanities focusing on domestic servitude and African-American work experiences in rural New York. The museum will work with Bard's Hudson Valley Studies Program and Columbia-Greene Community College to organize an annual “Colonial History Conference” that will bring together local historians and teachers to meet with academic historians engaged in scholarship pertaining to the Hudson Valley. Talks available through the museum's Speaker's Bureau are promoted in a brochure mailed annually to schools, historical societies, garden clubs and civic organizations. Topics to be offered in 1999 include: *The Tenant Farmer's Almanac*, *The Landscape Art of Montgomery Livingston*, and *The Evolution of a Hudson Valley Landscape*. Written evaluation of educational programs is required by both site and BHS policy. Teachers are requested to complete written evaluation reports that are used to improve the quality and availability of programs. Participants in lecture series and workshops also evaluate programs in writing. Visitor surveys are used to determine who our general audience is, why they visit Clermont and whether or not the tour program meets our objectives and their needs. The input of both program participants and providers is consulted to determine whether a given program should be continued or revised.

**Physical Facilities/Safety and Security**

1. The five-building complex, an award-winning design by architect Frank O. Gehry, includes an exhibit hall, auditorium, projects lab, classroom, administration office, and gift shop, with 20,800 sq. ft. of interior space and 40,000 sq. ft. of secured exterior area. Surrounding parking lots, which also serve the beach and boat ramp, accommodate 500 vehicles. The aquarium is fully accessible.

In keeping with CMA's emphasis on public education, more than 70% of the facility is allotted to exhibits and programs. The 7,600 sq. ft. exhibit hall employs wide-opening industrial doors to heighten the experience of bringing the coastline inside. The central courtyard is an excellent staging area for educational programs and special events. Visitors entering this area are greeted by life-sized whale, shark and dolphin models overhead and colorful marine-life banners fluttering in the sea breeze. The auditorium, used for daily multimedia programs and for lectures and films, seats 284 and has a stage, large screen and a variety of audiovisual equipment. A newly renovated 1500 sq.ft. marine laboratory provides a self-contained seawater system, versatile "wet" tables and counters, and microscopes for use in daily marine biology workshops.

About 25% of space, used for work and storage, includes an aquarists' laboratory, exhibits a carpentry shop, two moderate-sized collections' storage rooms, a main office with library, curatorial activities, graphics lab, publications, and a small lounge. A project lab, with darkroom and microscope room, is used for exhibit development, curatorial activities, publication production and research. An aquarium store, enlarged four years ago, stocks marine-related books and gifts. Three cargo containers in the rear of the complex serve as extra storage units for programs equipment, exhibit supplies and the aquarium store. A pickup truck and a new 23-foot boat enable aquarium staff to collect live specimens on a regular basis and three specially-outfitted vans are used for outreach programs and other offsite events. One van is bifuel, using natural gas as the primary fuel to minimize air pollution and demonstrate our commitment to environmental solutions.

2. Housekeeping of public and work areas is supervised by exhibits staff and implemented by four part-time custodians scheduled so one is present during all public hours as well as after hours. Floors, restrooms, exhibit cases, aquaria, and trash receptacles are cleaned daily, with attention to public restrooms and public areas throughout the day. Windows and blinds, floor waxing, paver scrubbing, and carpet cleaning schedules vary from monthly to annually depending on need. Aquarists clean aquaria daily. Collection's areas and special exhibit cleaning, such as hanging specimens, models, and case interiors, are handled by curators and assistants, with weekly light cleaning and annual thorough cleaning and clearing, generally in September when programs and attendance are lighter. Graffiti is cleaned or painted over immediately. Since the early 1980s CMA has recycled paper and cardboard in addition to aluminum cans used by staff and brought by children on school tours. The use of styrofoam, balloons, and certain other materials have also been discouraged. In these ways, housekeeping practices adhere to our mission as examples of environmental conservation practices.

Sea water system equipment, truck, and boat are maintained in-house by aquarium staff who provide coverage seven days a week. Pumps, temperatures, switching of pumps and filters, water pressures, and water levels are monitored and adjusted daily. Temperature control systems are inspected and calibrated twice a year or more as needed by firms on contract, and the emergency generator is tested monthly. Automatic emergency shutdown switches prevent most drainage and overflows. Electrical, plumbing, heating/refrigeration and masonry repair is provided by LA City technicians through a telephoned job order system. The truck, vans, and collecting boat receive routine maintenance and repair from quarterly and as needed. Equipment critical to life support and exhibits have on-site backups for emergencies. Dive equipment is maintained according to American Association of Underwater Scientists (AAUS). Lighting and audiovisual equipment is inspected and adjusted at least weekly by exhibits staff. Microscopes are cleaned after each daily use by education staff and also cleaned and repaired once a year by a professional technician on a contract. Workshop equipment is supervised and maintained by the exhibit's curator. The city provides maintenance and repair on city-owned or -leased computers and other office equipment. All equipment is assigned to specific staff members for responsibility, and they are expected to train or check out and supervise any other staff that has reason to use the equipment.

A City of L.A. emergency response system provides well-defined communication and responsibilities in case of major disasters. CMA has also developed site-specific emergency procedures detailed in a conspicuously marked manual that is posted in all major work areas. It specifies immediate and follow up responsibilities of staff and volunteers in case of earthquake, fire alarms, power failure, sea water system emergencies, injury to visitors or workers, burglary, vandalism, and intruder alarms. Individual staff responsibilities, and a basic protocol of communication to staff, security forces, and city officials are outlined. Staff and volunteer training, held in spring and fall, emphasizes public and employee safety, including

evacuation routes. Exits are clearly marked throughout the facilities with regular inspection by the Fire Department and routes are kept clear and unlocked. The location and operation of utility and sea water controls for each category of emergency are reviewed annually. Aquarists, on duty seven days a week, have lead responsibility on utilities and sea water equipment, but all staff are taught basics about critical equipment in case they are alone after hours. Staff notifies the lifeguards immediately in case of visitor injury, since highly trained and well-equipped lifeguards are close at hand during all public hours. A major hospital and a worker's compensation clinic are located within three miles.

Mechanical and electronic devices to enhance safety include the following: fire alarms, manual extinguishers, and an automatic fire sprinkler system throughout the premises; a video surveillance life support alarm system in the exhibit hall; alarm calls at the Touch Tank and in the gift shop; a public address system providing communication to all parts of the aquarium, with portable PAs at hand in case of power failure; an aquarium-wide motion detector intruder alarm system throughout that automatically alerts the Park Ranger central dispatch station, indicates exact location of disturbance, and sounds a loud alarm on the premises; and an on-site emergency generator that runs emergency lighting and the sea water life support systems. Fire equipment is maintained according to the LA City fire code and inspected regularly, and staff are trained in their use. First aid kits and eye wash stations are located in all appropriate areas and Material Safety Data Sheets on chemicals are kept on hand. Cabinets and shelving are bolted to walls and specimen shelving has barriers to deter jars from failing. Most equipment is permanently marked against theft or loss and registered in a municipal system inventoried annually. Heavy duty steel safes protect cash kept on hand in the Administration building and an armored truck takes cash to the bank. Architectural and secure use of chainlink secures outdoor areas.

We have suffered very little from theft, vandalism, or serious injury in 18 years in our current facilities. In addition to security devices listed above, public areas are regularly patrolled and monitored by staff, supplemented during heavy visitor periods by volunteers. Keys are closely controlled and issued to staff only. Work and storage areas are accessible only to staff and authorized volunteers. Park Rangers, Port Police, and Police Department are notified at the beginning of the week of all pending evening functions to encourage extra patrolling in the area. Park Rangers are assigned to major nighttime events such as grunion programs and FRIENDS openings. Lockup duty assignments each day follow a specific route and procedures to cover the large number of doors, windows, and gates, and a night custodian provides backup. The CMA perimeter, courtyard, and lots are lit at night. Vehicular access to the area is barred after 10:30 p.m. Gates and doors to non public areas are marked with "staff only" signs and kept locked on weekends and evenings. Stored collections are kept locked at all times.

**Physical Facilities/Safety and Security****1. How does the Museum use its physical resources in providing Museum services to the general public and specialized audiences?**

As previously stated, the Museum is housed in our greatest artifact, the 1850 Weighlock Building. In the autumn of 1992, a new building addition to create the Syracuse Urban Cultural Park Visitor Center increased the interior square footage by 50% for a total facility of 20,000 square feet. Surrounding the Museum are 4,000 sq. ft. of permanent outdoor exhibits in two plazas, one which contains a prize-winning Locktender's Garden courtyard. Adjacent to the east plaza is a small (2,000 sq.ft.) building used for exhibit preparation and general storage. The Canal Center, a facility in Old Erie Canal State Park four miles from the Weighlock Building, also provides 2,000 sq. ft. of storage to the Museum for two canal boats.

Of the total usable space (the two main floors, parts of the basement and the attic), 50% is used for permanent exhibits, 10% for changing exhibits, 30% for climate-controlled collection storage, 5% for offices, and 5% for the library. The ECM's use of the Weighlock Building as a museum has been referenced by the State Office of Historic Preservation for its excellent solutions to the period restoration/professional function dilemma. For example, the original drafting records room is used for the library, and what was a 2,000 sq. ft. drafting room with a glass-walled engineer's office now serves as the special exhibition gallery and staff offices. The Weighmaster's Office and Weighlock Chamber, the interpretive heart of the Museum, have been restored to the appropriate time period.

In addition to the exhibition areas, the Museum operates a gift shop that is stocked with a variety of canal-related items and books. The Buchanan Library, occasionally used for board and staff meetings, is available to the public for historical research, meetings, and receptions. There is a 50-person theater where visitors can view a 15-minute audio-visual presentation, narrated by E.G. Marshall, that describes the history of Syracuse and the influence of the Erie Canal on economic development. All of the Museum's public spaces and exhibits, including the canal boat, theater, gift shop, and outdoor Locktender's Garden, are wheelchair accessible.

**2. What practices and schedules does the Museum follow to ensure the proper care and maintenance of its physical plant?**

The ECM's maintenance program revolves around the Weighlock Building, the 1992 building addition, outdoor plazas, and storage buildings. The Weighlock Building has an annual maintenance schedule which includes pointing, staining, and painting. In 1985, the existing windows were replaced with State Preservation Office approved thermal pane windows which have dramatically improved dust and climate control while remaining visually appropriate to the historic structure. The roof was replaced with an insulated rubber membrane in 1988 to enhance climate control capabilities. As part of the new building construction project, a new heating, ventilation, and air conditioning system was installed in the Weighlock Building.

Because the Museum's building and land are owned by Onondaga County, the ECM has the benefit of being part of the county's scheduled maintenance program. In addition, all of the new construction, including the new mechanical, electrical and security systems in the Weighlock Building, are under five to fifteen-year warranties. Onondaga County purchased service contracts for all systems, and the Museum is part of the county's 24-hour physical plant emergency network.

All repairs and maintenance are coordinated to ensure the least disruption of public services by scheduling routine procedures before or after visiting hours whenever possible. The safety of visitors is a primary concern during any repairs or procedures that cannot be done after hours, and security measures are taken, such as partitioning off affected areas, whenever necessary. The 1997 painting project of the second floor Education Gallery and offices was scheduled between exhibits to minimize visitor concerns. In extreme cases, the Museum has closed its facility for the safety of the public, such as for the delivery and pick-up of the exhibitions.

The Exhibits Preparator/Facilities Manager has received formal instruction in all system operations and coordinates all repairs and maintenance with the county and other contractors. Routine building cleaning and grounds upkeep are the responsibility of a contracted maintenance person who is supervised by the Exhibits Preparator/Facilities Manager.

**3. How does the Museum ensure the safety of its staff, visitors, facilities and collections?**

The ECM combines the safety features of its well-designed, code-complying facility with a well-trained staff to minimize risk through accidents or natural disasters. The new building construction and renovation to the historic Weighlock Building were reviewed by the county's risk manager and the Museum's insurance underwriter to confirm that the staff and visitors, the collections, and the exhibits are housed in a physically safe environment. Museum staff and volunteers receive training in safety procedures and medical emergencies, which are presented in the Museum's Operating Procedures Handbook. This publication also contains a comprehensive disaster plan, which was updated in summer, 1998. In part with updating the plan, the city fire marshal conducted a training session with staff. In cases of accident or injury, the 911 Emergency System can be called, and response is almost immediate due to our centralized, downtown location. In the unlikely event of flood, fire, hurricane, or other emergency, procedures for building evacuation are clearly presented. The plans outlined always call for employees to gather visitors for evacuation, and in cases (such as flood) where collections can be protected, employees are given exact instructions for handling and relocating objects in the collection.

A 24-hour monitored smoke, fire, and intruder security system protects the Museum. All exterior and key interior doors are monitored for interruption in electrical contacts, and all galleries and offices are monitored for motion. The security code is given to Museum staff members only. As an additional safety precaution, the Museum receptionist has a "panic button" tied directly to the police department for use in an emergency. In 1995, the ECM installed a new security system consisting of four closed-circuit television cameras in our permanent and special exhibition galleries. The security monitor is supervised by the Museum receptionist. With this permanent feature, the ECM is eligible to host high-security exhibits. Additional security in the galleries is achieved with interior sound alarms which alert the Museum staff of trouble. Zoned motion detectors protect the exhibit vignettes in the Education Gallery. Collections storage areas are locked with limited access to keys. Areas of restricted access are either designated Staff Only or a physical barrier is in place. Museum staff offices are adjacent to exhibit areas and employees monitor them as they go about their daily business. Fire extinguishers are located throughout all buildings as a back-up for a dry pipe sprinkler system. Exterior lights, activated by timers, illuminate the buildings and grounds at night to deter vandalism and to provide lighting for evening visitors. The Syracuse City police monitor the Museum and storage building 24 hours each day as part of their routine responsibilities.

## Staff

### 1. How are the qualifications, responsibilities and professional activities of the Museum's permanent professional staff appropriate to the Museum's Mission?

There are 12 permanent staff members (10 FT; 2 regular PT; 8 women; 4 men; 4 minorities). Full-time staff include: (1) the Executive Director (25 years experience as elementary teacher & Museum founder; experience in bilingual & computer education; State Director of Odyssey of the Mind; area School-to-Work Coordinator; currently completing an MA in Museum Studies at the U. of Oklahoma, tuition paid by Museum). (2) the Director of Resource Development (Ph.D. in educational administration; 30 years experience as college dean and small college president; established degree-granting programs; active in children's issues); (3) the Exhibits Director/Program Coordinator (25 years experience in Art and day-care education; developed program for Art Creativity Central funded by State Arts Council) (4) four Exhibit Floor Managers (with varied experience, one as a school board member, one in retail, one a construction engineer, one a volunteer/community service worker), who work with visitors and manage docents who are working in exhibit areas; (5) the Director of Docents (retail, volunteer experience); (6) Physical Plant Director & Curator of the Aquatic Education Exhibit (10 years experience in building management; personal interest and avocation in wildlife management; co-hosted water pollution program with State Dept. of Wildlife Conservation; attends state and regional conservation and EPA meetings & training); (6) Bookkeeper (attending Seminole State College, AA in accounting, paid by Museum); (7) Administrative Secretary/Receptionist (attending Seminole State College, AA in office administration supported by Museum).

Regular part-time staff include the Assistant Physical Plant Director/Aquatic Education Curator and Gift Shop Manager. Additional part-time staff work as weekend cashiers. All regular staff participate in our Community Service Program that permits two time-away hours monthly with compensation to service area groups. The Museum prides itself on its dedicated staff, its efficiency and the lack of unnecessary administrative procedures, peer evaluation processes, innovative staff and community-service program, staff development opportunities, 401-K matching program, and profit incentive program. The Director judiciously uses the services of consultants and expertise of Board members, who often provide expertise areas such as financial management, engineering, and environmental design.

### 2. What personnel policies and practices does the Museum follow?

The Executive Director and representative committee completed an Employee Manual, approved by the Executive Board in 1997. It consolidated and published policies and management procedures on personnel matters--hiring, termination, grievance, salary and fringe benefits. It is the Director's prerogative to hire staff and to involve staff in advertising, interviewing, and selection processes for choosing qualified new employees. Qualifications are by experience and education; positions are advertised. The Director conducts employees' performance reviews for initial probation for newly hired staff members, for continuing appointment, and for salary increments based on merit and performance. The Executive Board conducts an annual performance evaluation of the Executive Director. Area supervisors direct staff and docents reporting to their areas. Besides the printed manual, staff policies and procedures are explained at orientations. Salaries at the Museum are equal to comparable salaries for positions in the region and at other Oklahoma museums. Staff persons have 2 weeks paid vacation time at the outset, which increases with years of service; paid sick and bereavement leave; and compensation for jury duty; and medical, dental, and retirement benefits. The Museum is in its second year of a pay incentive plan, going beyond base salaries and based on increased attendance, gifts'-revenue and utility and other savings. Incentives for FY'98 amounted to \$17,440, an increase over last year.

We give high priority to staff development, which we see as key to personal, professional, and program growth. Staff are encouraged and (for certain staff members) required to take essential health and safety training, which is paid for by JMCM incurred for health and safety training certificates or updating are reimbursed. Formal non-credit and credit-based course work leading to certificate or degree programs are free. The Director attends annual conferences and seminars dealing with planning and revitalizing Museum programs sponsored by the Association of Youth Museums, the Oklahoma Museum Association, and the Center for Non-Profit Management. As an OMA member, she serves as a presenter with the regional Mountain Plains Museums Association, on drafting lesson plans for teachers who utilize children's museums on museum/school-to-work programs. The Director and Director Resource Development have participated in several seminars offered by the Center for Non-Profit Management on marketing, management, and fundraising. The staff as a whole participated in off-campus workshops on computer updating, Internet training, and first aid programs at such places as Seminole State College and the Seminole Municipal Hospital; also an on-site program in empowerment led by Dr. Notaro. Select staff persons were supported to attend on-site in-service workshops on sign language (to accommodate our hundreds

of special-needs visitors) and pollution control education. Individual staff members have participated in other seminars at JMCM expense in areas relevant to their positions.

### **3. How does the Museum select, recruit, train, and use supplementary staff?**

JMCM makes extensive use of paid and volunteer supplementary staff. The exemplary performance of a corps of 302 adult and teen-age volunteer docents (who give 16,194 hours of service during the last year and 15,240 in the previous year) is essential to the success of our School Visitation Program and supporting visits by families and community groups. Docents come from colleges, schools, service clubs, and businesses. Our Director of Docents recruits, selects, orients, and trains volunteers in four, two-hour long sessions. She evaluates docents, plans for their development programs, and rewards them for exemplary service. Docents serve as welcoming greeters, orientation explainers for all exhibits, traffic directors, and safety monitors. They also perform non-exhibition duties, such as helping with light housekeeping. For example, thirty companies such as ARKLA Gas and BancFirst have Employee Volunteer Days; this mechanism provides adult volunteers who assist us in special events, maintenance, and other areas. Teen-age docents (229 youth, 11-19; 73 adults older than 19), 11 to 19 years of age, are effective in helping younger visitors and older caretakers with more strenuous activities, such as entering and using the movable flight simulator. We are fortunate to retain teen volunteers from local school districts because we promote social activities for them or take them on trips. Older students volunteer through Seminole State College. We also hire consultants, contractors, and other outside expertise to supplement our staff. Non-paid consultant “experts”, such as paleontologists from the U. of Oklahoma and teachers who helped us design Dinosaur Dig, lawyers and judges who helped us develop Kids Court, or representatives of various professions who participate in our Career Days, are absolutely essential to our operations. We also hire contractors to provide specialized services, such as computer updating, staff development, or tasks related to renovating or maintaining our facility and grounds.

## Staff

1. The DMNH's greatest resource is its highly competent staff of 240 regular and 250 part-time and seasonal staff. Just over 60% are female, and 15% represent racial minorities. **Ralene Decatur, President & CEO**, started April 1995, has 21 years museum experience including, Deputy Executive and Senior Director of Programs and operations at the Maryland Science Center; M.A. in American Studies from George Washington Univ.; board member of AAM, Museum Film Network, International Space Theater Consortium, and Denver Metro Convention and Visitors Bureau. Reporting to her are **seven division directors** who bring extensive expertise to their leadership positions. The 30 department heads have degrees relevant to their field, experience, and technical training appropriate for their positions (see organizational chart).

The **Collections and Research Division** is headed by Dr. Richard Stucky, Chief Curator, Ph.D. in Paleontology, Univ. of Colorado; 25 years museum experience, VP - President Elect of the Society of Vertebrate Paleontology. He heads a total staff of 42 organized into six departments. Of the 12 curator positions, 9 have Ph.D.s, 2 M.A./M.S. with 28 years of experience each, 1 curator search in progress; 3 collection managers; 2 M.A. conservators; 3 publications staff; 2 preparators, one with a Ph.D.; 1 GIS/database expert; an archivist, photoarchivist, and a librarian with a M.S.L.S.; a master's level fellowship in ornithology; and 15 support staff and others.

The **Exhibits Division** is led by Dr. D.D. Hilke, Director of Exhibits, Ph.D. in Psychology, Cornell Univ.; 16 years museum experience; current board member of The Institute for Learning Innovations and former officer of the AAM Committee for Audience Research and Visitor Studies Association. She heads a total staff of 49, organized into four departments: 9 designers and interpreters, 19 production staff, a full-time exhibit evaluator, 10 multi-media and graphic designers, and 10 support staff and others. Four new staff were recently hired to work on the space science project, including Susan Kodani, formerly at the Bishop Museum.

The **Education Division** is headed by Jim Goddard, Director of Education, M.S. Hospital Administration from the Univ. of Minnesota, 12 years museum experience, past President of the National Association of Health Education Centers and the Colorado AIDS Project. He also recently served on the "Colorado Science and Mathematics Education Coalition." He leads a total staff 165 organized into four departments: 17 Planetarium and INIAX, 5 Adult Programs, 17 Youth and Teacher programs and 3 outreach, 9 Visitor Programs, a total of 103 teachers (for all departments), and 11 support staff and others.

The other four divisions serve key functions in marketing, development, administration, and finance. **Luella Chavez, Director of Marketing**, M.B.A. from Univ. of New Mexico, 8 years museum experience, currently active in three local marketing committees for cultural organizations; heads 13 total staff. **Bonnie Downing, Director of Development**, M.A. in Political Science from Univ. of Colorado; 17 years fundraising experience; IMLS/GOS reviewer for 7 years; on the faculty of the Museum Management Institute; heads 13 total staff. **Dennis Linden, Director of Administration**, M.B.A. from Michigan State Univ.; 11 years museum experience; heads 193 total staff. **James Barlow, Chief Financial Officer**, B.S. in Business Administration from Univ. of Colorado; C.P.A., 18 years finance experience; 2<sup>nd</sup> Vice Chair of the AAM Museum Management Committee Board; heads 13 total staff.

Staff skills and knowledge are **shared with the community** in a variety of ways, and collaborative projects are the basis for much of our community work. Our **curators** are especially active and serve two goals: to conduct scientific research and to share their knowledge and experiences with the public. Beyond their research and education duties, they give tours, respond to information requests, identify specimens, and participate in career days and job shadowing for youth. **Education staff** serve on statewide and local committees such as the Informal Science Education Network and the Balarat Council for Denver Public Schools. **Exhibits staff** are working with the Integrated Teaching and Learning Lab at the University of Colorado to give engineering students a chance to work on real-world projects. Our **Teen Program** Coordinator consults with organizations trying to establish teen programs, such as Denver's new aquarium and the Mayor's Office of Art, Culture, and Film. **Groups of DMNH staff** work together on projects such as the Colorado Digitization Project that involves the Colorado State Library, the University of Denver Library, and others (IMLS funded). Many of our professional staff frequently lecture for Museum Studies Programs offered by two local universities. The DMNH participated in an International Partnership Among Museums exchange program with the Moto Moto Museum in Zambia to develop products in association with the *Africa* exhibit. DMNH staff **actively volunteer** for community organizations such as Boy and Girl Scouts, Channel 6 - PBS, Plains Conservation Center, National Disaster Medical System, Jewish Volunteer Resources, Bonfils-Blood Advisory Council, Volunteers of America, Salvation Army, Denver Indian Center, Urban Wildlife Photography Club, and many others.

Staff are involved in **professional activities** such as reviewing federal grants; serving on editorial boards; teaching and doing research as adjunct professors at universities; serving as graduate advisors; and serving as panelists or organizers for AAM, ASTC, and local museum organizations. **Leaderships positions** are held on many local, regional and national museum organizations and professional societies. Examples include: Amer. Quaternary Association, Amer. Association for the Advancement of Science, AAM Volunteers, AAM/ICOM, Amer. Society of Mammologists, CO Chapter of the Prospect Research Association, Visitor Services Association, National Association of Health Education Centers, CO School Health Council Board, and Univ. of Colorado Museum.

2. Financial support, time off, and flexibility in schedules to attend conferences and workshops are some of the ways in which **professional development** is supported. In 1998, \$137,785 was budgeted for professional development, and some 50 staff attended professional meetings such as AAM, ASTC, and others. The Museum encourages all staff to participate in internal training programs which are part of an ongoing training continuum. Recent examples include a project management course that was attended by 50 staff, and improving customer service was attended by some 90 front-line staff, supervisors, and phone reservationists, and 870 *Imperial Tombs* volunteers. All-day diversity seminars are delivered by two minority consultants for all new employees. Personal health and safety topics such as Breast Cancer Awareness and acupuncture are given as lunch-time lectures.

The **Employee Handbook** initially adopted by the Board in 1988, is reviewed biannually by senior staff and in 1997 was reviewed by Mountain States Employer's Council to ensure that it reflects current human resources management thinking and is consistent with current legislative and legal requirements. The main policies covered are employee status, EEO, sexual harassment, family medical leave, performance, promotion, termination, drug and alcohol policies, compensation, and leaves of absences. Each new employee receives a handbook and an orientation manual and attends an employee orientation that includes records management, tours, and a slide show of the Museum's history. The Personnel Manager ensures compliance with personnel policies and procedures, as well as develops and monitors all of these systems.

**Recruitment, hiring, performance, and termination policies and procedures** provide for a consistent approach to these critical human resources components. Formal job descriptions were revised in 1996, along with a new job grading system and a salary survey. All positions require a personnel requisition, are first posted internally, and then externally and advertised locally and nationally, i.e., *Aviso* in order to solicit as broad an interest as possible. Search committees with cross-divisional representatives assist in the hiring process for professional positions. Performance review encompasses both formal and informal feedback by peers and supervisors. An initial review is performed at six months and annually thereafter. Employees receive raises based on merit. Termination is the last resort, must be well documented, and reviewed by two levels of supervisors as well as the Personnel Department.

Our **benefits plan** is a comprehensive and competitive package. In 1996, the Personnel Department surveyed staff and worked with Buck Consultants to conduct a thorough review of all benefits. Recommendations have been incorporated into our plan. Benefits include health and dental insurance; annual, sick and personal leave; short- and long-term disability; optional eye glass/lens; flexible spending account; basic and supplemental life; and accidental, death and dismemberment insurance. An alternative medicine discount program was added for 1999. Personal leave up to six months for medical or personal reasons may be granted. The Museum increased its match of the tax sheltered annuity (403B) to 5% from 4% beginning in 1999. Between 75% to 90% of the monthly premiums for staff and their families based on coverage type are covered. Additional benefits offered are 10 holidays, free passes, and Shop/Deli discounts.

3. Our **Volunteer Program** ranks among the top in the U.S. among natural history museums, with 1,300 active volunteers involved in many operational aspects. Recruitment is from membership, corporations, community and multicultural groups, colleges, and high schools. Volunteers developed their own placement interview, orientation, and training program in 1990, still in existence today. The Teen Program had 120 participants in 1998 who are trained with staff and mentored with adult volunteers. Written evaluations of all volunteers who deliver public programs are conducted. A formalized **intern program** had 51 interns in 1998 (26 were paid and 25 unpaid) who came from all over the U.S. and foreign countries. They are recruited through high schools and universities. Some 20 different **advisory groups** work mainly with project teams and departments on specific activities. Many different **consultants** such as marketing, fund raising, engineering, exhibit development, scientists, and 50 **department associates** are used extensively.

### **Governance and Management/Financial Management**

The Ethan Allen Homestead Board of Trustees has made dramatic changes in the past two years in order to better serve the mission and long-range goals of the museum. Transition from Board of founders to the next generation shook the institution in 1996-97. Founders retired from active duty and the Executive Director, the only full-time staffer, moved on to another institution after eight years in the position. The burdens on new trustees, in conducting a director search and in taking up management slack, fatigued them and sidetracked them from setting their own vision for the museum. With a new director in place, the Board has addressed issues of vision, size and expertise with enthusiasm. It is small but active and is seeking additional members to be more representative of the region, link the museum to more elements of the community and meet the museum's financial challenges. The Board added four members to its total in 1998 and anticipates adding another four in 1999, which will bring the total to a healthy fifteen. Trustees are being recruited from the younger generation of community leaders. Younger trustees bring energy and an entrepreneurial spirit to the Board. They are committed to children and family programming and many are not yet serving on multiple nonprofit boards. Since this generation of leaders is not as experienced in trusteeship, the Board is also carefully recruiting seasoned trustees of stature, such as the former governor of Vermont, to guide them.

There are presently eleven trustees, each providing important expertise and service. The chair is a business executive with experience in nonprofit fund-raising. Other trustees include the founder of the Center for Research on Vermont at the University of Vermont, editor of the published letters of the Allen clan, a banker, a retired colonel, the former governor of Vermont, an independent nonprofit consultant, two native Vermonter attorneys, a neighbor and academic librarian and a public relations specialist and producer of special events.

The museum was founded by a board of ten trustees, and bylaws allow for a board of seven to 21 trustees. Trustees serve three-year terms. Terms overlap so that no more than 1/3 of the board is elected each year. Trustees may serve no more than two successive terms without at least one year off the board. The board elects four officers annually: chair, vice-chair, secretary and treasurer. Officers function as the board's executive committee, reviewing proposals for the full board and acting in the board's stead when necessary. A nominating committee identifies prospective trustees, considering qualifications and the museum's needs. Nominating committee members meet with prospects to determine their interests and acquaint them with the museum's mission. The board elects trustees in June or when openings occur. The director schedules trustees orientations to review the museum's operations.

The job description for trustees defines the primary role as setting policy and monitoring implementation. It lists additional responsibilities: evaluating organizational effectiveness; ensuring fiscal health; safeguarding legal integrity; serving as a link to the community, and enhancing board performance. Trustees determine long range plans and approve the annual plan and budget. The museum has a formal lease agreement with the Winooski Valley Park District to manage the historic site, but beyond the stipulations of the lease the park district plays no role in governance or management. At each meeting, the board reviews finances and progress toward goals. Trustees serve on committees and contribute expertise as requested by the chair or director. They act as ambassadors, building awareness of the museum's mission and activities. Advising the board and helping fulfill its policies are committees chaired by trustees and composed of trustees and volunteers: Development, Collections, Buildings and Grounds, Marketing, Nominating and Program. Each has a mission statement and reports as needed to the full board. The executive committee reviews major management decisions with the Executive Director and serves as board of appeal in personnel matters.

The museum's management structure is a simple, effective means of achieving communication and efficiency in a small operation with an ambitious agenda. The trustees delegate to the Executive Director management of the museum. She in turn delegates authority to other staff according to their job descriptions. The executive director is the liaison between board and staff. She coordinates and attends board and committee meetings, and other staff attend or submit written reports by her or the trustees' request. The program director manages volunteers, though each staff member supervises volunteers in her/his area of responsibility. The staff meets weekly to share information and ideas.

The museum's financial condition is good and improving. The founding trustees took on \$400,000 in capital debt in 1988 based on indications of corporate support and optimistic earned income projections. Corporate support was disappointing and earned income slow to grow. A capital campaign to retire the debt and subsidize operations consumed the first four years of operation. Gradually lessening debt service permitted additions to staff while holding down operating expenses. The museum ran deficits because many donors designated gifts for capital debt reduction. The museum carried deficits on a credit line and paid them over the course of each following year. Deficits declined until 1992, when a push to

retire outstanding capital debt diverted gifts from operations. The trustees then shifted focus to securing operating income. The board invested in a development director, added programs to build audience and launched an annual giving campaign. 1993's deficit, lower than 1992's but higher than previous years, reflected these investments and early results.

In 1994, the museum experienced a drop in earned income and lost fund-raising momentum with a change in development staff. In response, trustees cut expenses and stepped up fund-raising. The board adopted a plan to retire outstanding credit line debt (\$30,000) and create a reserve to address income fluctuations, leaving the credit line as a last resort. In 1995, the museum paid off the credit and raised enough reserve to finish the year out of debt. An "entrepreneurial" foundation grant increased the development director's time. She began outreach programs to build membership and annual giving. \$13,000 in endowment "seed money" was pledged in another important leg of financial security. The annual campaign more than doubled to \$15,500. The 1995 excess reflected that success, though its significance is exaggerated by a \$30,000 grant received in December for 1996. In 1996, the museum began the endowment program with the seed money and planned giving and exceeded the \$20,000 annual fund goal. The 1996 excess reflected expenses against a large 1995 grant. 1997's fundraising successes were all the more sweet because they were achieved despite considerable challenges during the six-month gap between directors. The departure of the executive director in early 1997, and the resulting management responsibilities that fell upon the shoulders of Board and staff, diverted attention from fundraising and enlarging the donor base. In the final quarter of 1997, however, with a new director on board, fundraising was reinvigorated. The annual fund goal of \$25,000 was exceeded and several grants from new foundations were received. Negative operating revenue for 1997 reflects expenses against grants received in 1996. In the first weeks of January 1998 the board raised \$14,000 in response to a special challenge. 1998 has proven even more salutary. The membership program was revamped and the first serious membership drive conducted. The annual fund goal of \$30,000, the museum's largest ever, was exceeded. A major grant of \$50,000 in support of existing and new education programs secured the museum's commitment to focusing on education. The Planned Giving Committee secured over \$250,000 in pledges for the endowment. The museum's donor base still needs to recover from the 1997 transition period, and that effort is the top priority for the development plan for 1999.

The museum's operation shows financial realism quickly replacing over-optimism, and flexibility and resiliency during difficult times. The museum has kept expenses down while getting the most out of a lean budget. Our record of community support is strong, and the museum shows an ability to fulfill sound plans. The museum met start-up challenges with tight fiscal control, clear delineation of responsibility and regular procedures for administering and reporting finances.

The executive director projects income and expenses of activities planned each year in pursuit of long-range organizational goals. The executive director develops an annual budget for review by the executive committee. The committee reviews the proposal, suggests changes, and recommends the amended proposal to the full board. The executive director is responsible for daily financial administration. The trustees authorize her to sign checks up to a certain amount and draw on the credit line, always informing the treasurer of the latter. The administrative and program assistant records and deposits daily receipts (run through a cash register and documented with its tape) and prepares checks for the director's signature. All expenditures must have documentation. The administrative and program assistant keeps computer records of income and expenditures. An independent bookkeeping firm reconciles checking account registers and computer records with monthly bank statements, and posts them for monthly reports. The executive director submits reports to the treasurer and discusses finances weekly with him and the board chair. They are authorized to sign checks and draw on the credit line; when large sums are concerned, the director obtains their signatures. The director and treasurer report at trustees' meetings. Trustees review the budget and authorize changes. The director has managed the finances of two museum departments and two nonprofit organizations with budgets of about \$170,000.

#### Operating Revenues

Excess (Deficit)	(5,917)	(24,212)	(11,054)	(7,534)	45,641	182	(11,068)
	1991	1992	1993	1994	1995	1996	1997

**Governance and Management/Financial Management**

The JCM is an agency of county government; the five members of the Board of County Commissioners (BOCC) form the governing body. These five elected officials have experience in business, government, and community activism. The BOCC positions are part-time; they serve in a policy-making capacity and have delegated responsibility for daily operations to the professional staff. Members of the BOCC are elected to three-year terms; their orientation is conducted by the other members of the BOCC and by the County Administrator.

The BOCC appoints a seven-member **Museum Advisory Council (MAC)**, with consideration given to the MAC's and Director's suggestions for new members to insure geographic/gender/racial/skills balance. MAC members serve rotating terms of three years, renewable for one additional term. The Director conducts the orientation for the new members and provides each member with a **Board Manual**, which has copies of governing documents, policies, a description of programs, the long-range plan, and staff responsibilities and qualifications. The MAC members bring a broad range of skills and experience to the JCM; members include a professor of history, three community volunteers (one with extensive experience in historic preservation), a retired teacher who is active with the NAACP, a businesswoman, and a farmer. The Director is a non-voting member of the MAC. The MAC meets three times a year (more often if needed) to provide public input for JCM operations and to make recommendations concerning JCM policies. The Director takes MAC recommendations to the BOCC for approval. One MAC member serves on the Collections Committee; two members serve on the Friends Board of Trustees.

The **Friends of Johnson County Museums** (a non-profit organization) was formed to provide private support for the JCM. The Board of Trustees is composed of fourteen members: eleven are elected from the membership; the JCM Director serves as treasurer, and the MAC president and one other MAC member serve on the board. This structure was selected purposefully to provide a strong intermeshing of the two groups; it has been very successful in providing unified leadership. Board members are elected for a two-year term and may be re-elected for a second two-year term. Orientation is conducted by the Director and members receive a **Board Manual** as detailed above. Careful consideration is given to electing members who provide the geographic/gender/racial balance to represent the county and bring the skills needed on the board. The eleven elected members include one attorney, an architect, the social studies resource specialist for a school district, a member of the advisory board for a school district, an executive with a bank foundation, and six representatives from major corporations. The Friends Board meets every other month. The Friends' committee structure is reflective of its primary purpose of raising money; committees include Development, Finance, and Membership as well as Nominating/Bylaws. The MAC and Friends Board members enhance the effectiveness of the JCM's operation by being active in the community. They are graduates of leadership programs, serve on other boards and participate in several Chambers of Commerce. In addition, they fairly represent the diversity of the community (economic, racial, age, gender, geographic) and of the JCM's target audiences (teachers, parents with young children, new and long-time residents, Johnson County and Kansas City). Clear delineation of responsibilities (spelled out in a **legal agreement between the BOCC and the Friends**) and open lines of communication make the governing structure very workable.

The Museum Director is a member of the county's **Executive Team**. This team, which includes all department directors, meets monthly with the County Administrator to address issues affecting all aspects of county operation and to discuss strategic planning on a regular basis. The county is responsible for personnel, budget/finance, purchasing, safety, and legal counsel. Policies specific to the JCM (collections, exhibits, and programming) are recommended by the MAC to the BOCC; the BOCC meets weekly. The Director provides a written monthly report of activities to the BOCC, MAC and Friends Board.

**The Director of the JCM is the link** between the BOCC, the MAC, the Friends Board and the museum staff. Staff meetings are held weekly to communicate on various aspects of the JCM operations. The three Curators, the Marketing & Development Officer, and the Survey Manager serve as equals, responsible for their various departments. These five positions report to the Director. The Registrar reports to the Curator of Collections. The three Curators, the Marketing & Development Officer, and the Director form the Planning Team to develop exhibits and educational programming; these meetings are held as needed. The Registrar also participates when the discussion is about an exhibit. When programs involve the LSHS, the Site Manager is included in the discussions. As the Site Manager's main responsibilities are public programming, this position reports to the Curator of Education. The two part-time Education Assistants report to the Curator of Education. The Museum Assistant serves as an administrative assistant and receptionist. The Director, three Curators, Marketing & Development Officer, three members of the Friends Board of Trustees, and three MAC members comprise the Long-Range Planning Committee.

The financial condition of the JCM is stable and has seen a steady increase of support from the county and substantial generation of new support from the community. As an agency of county government, the JCM uses zero-based budgeting and is prohibited from operating a deficit budget. Excess operating revenues are returned to the county general fund, where they set aside for capital improvements and emergencies. (For example, some of the surplus operating revenue was returned to the JCM in 1998 for purchase of computer equipment for Y2K compliance.) The Friends has operated with an excess of operating revenues each year since their incorporation in 1988, other than in 1994 and 1996. The annual excess revenues were used to create operating reserves, which totaled almost \$41,000 at the end of 1996. Part of this operating reserve (\$25,000) was used as seed money in the fundraising campaign for *Seeking the Good Life*. The modest operating deficit in 1994 was anticipated and was due to the costs of initiating an expanded fundraising campaign. The small deficit in 1996 was also anticipated and was the result of a reduced Annual Campaign due to emphasis placed on major fundraising for the new permanent exhibit. The fundraising for *Seeking the Good Life* has been very successful and is an indication of the JCM's ability to diversify its funding base. The JCM raised \$801,000 from 70 corporations, 23 foundations, 218 individuals, and with grants from five federal, state or local agencies. (As the permanent exhibit is considered a capital project, these funds are not included on the operating budget forms A & B.) As an agency of county government, the JCM does not hold assets on its own; therefore, the deficit and excesses shown below are for the Friends only.

Instructions for preparing the annual budget are distributed to county departments in February. The Director uses the JCM Long-Range Plan as a guide in developing the budget. The Director works with other staff members as needed to determine operating costs for the next year. After the Director prepares a draft of the projected expenses and a narrative, the MAC reviews the budget and makes recommendations to the BOCC. The final form is submitted to the county's Budget Office for review. The budget is then submitted to the county administrator and BOCC for review. The BOCC's approved budget is adopted in August for the following year. All purchases are governed by state laws and procedures developed by the county's Purchasing Office. Requisitions must be signed by the JCM Director. Purchase orders must be issued by the Purchasing Office. The Museum Assistant prepares all payment vouchers and payroll worksheets; these are signed by the Director before being forwarded to the Finance Office for payment. The Finance Office provides printed monthly financial statements, and the Director has access to an on-line financial system to monitor the JCM activity between the monthly statements. The Budget Office routinely provides oversight to assure that departments are within their approved budget authority. The Finance Office maintains a separate accounting category within the county's overall accounting system for the JCM; separate accounts are maintained for grants as well. The Finance Office supervises the county's annual audit by Ernst & Young.

The budget for the Friends is developed by the Finance Committee, composed of the Treasurer (JCM Director) and two other board members. The budget reflects the goals established by the JCM for the coming year. The proposed budget is presented to the Friends board for adoption in December. The treasurer prepares financial statements for board approval at their meetings and an annual balance sheet. A retired CPA volunteers to work with the treasurer on a monthly basis to assure compliance with generally accepted accounting procedures; he reconciles monthly bank statements. The Friends books are audited annually by an independent accounting firm; this firm also prepares the 990.

The Director has taken an accounting class and seminars; she has also attended training sessions on purchasing policies and the financial systems used by the county. The Museum Assistant has also attended the training sessions on purchasing policies and the financial systems. The director of the Budget Office holds a M.P.A. The county consistently wins national awards for financial management.

Operating Revenues	1994	1995	1996	1997	1998
Excess (Deficit)	(3,930)	3,311	(2,211)	26,912	9,718

## Support

### **How does the community's non-cash support of museum operations demonstrate commitment to the museum's services?**

The community's non-cash support of gallery operations is widespread and diverse. The galleries regularly collaborate in resource-sharing projects with many other cultural institutions and organizations, including Fairmount Park Art Association, Philadelphia Museum of Art, Fabric Workshop and Museum, University of the Arts, Philadelphia Folklore Project, African American artists' cooperative Recherche, National Council on Education for the Ceramic Arts, International Sculpture Center, Southwest Community Enrichment Center, Pew Fellowships in the Arts, Prints in Progress After-School Program, Eastern State Penitentiary, West Philadelphia Cultural Alliance, and the Free Library. Cost-sharing with other galleries and area universities stretches monies for catalogs, framing, shipping, and advertising.

Substantial donated services come from within and beyond the local community including lectures by artists, architects, curators, and critics of international distinction; instruction of a 6-week course on collecting and connoisseurship from a member of the Advisory Board; curatorial, editorial, and program consultation from Mark Rosenthal (curator at the Solomon R. Guggenheim Museum); Anne d'Harnoncourt (director of the Philadelphia Museum of Art [PMA]), Cheryl McClenney-Brooker (vice president of external affairs at PMA), Ann Temkin (curator of 20th-century art at PMA); Charles Blockson (curator of the Blockson African American Collection at Temple University); and Swiss curator Harald Szeemann. Pro bono consulting comes from a vice president at Prudential-Bache Securities and a former vice president of the CIGNA Corporation; 2 attorneys and a judge; a professor of architecture at Princeton University; as well as PR consulting from a city and a state representative, a director of the convention and visitors bureau, and an advertising firm; catalog design from an acknowledged graphic designer; and creation of a new and effective database by a local IT consultant. In the past year, local businesses donated accommodations, subsistence, and airfare for 3 visiting artists; refreshments and flowers for 6 receptions; and catering for a benefit, while Kibbutz Lohamei Hagetaot donated the crating of Moshe Kupferman's paintings. Leaders of community-based organizations consistently come forward to help the galleries get their message out to targeted audiences through phone calls, personal letters, and mass mailings: the Justinian Society, the America Italy Society, the Jewish Federation, and the French Consul, combined, undertook mailings of 2,900; and free air time was given by Comcast Cable Network, France Amerique Radio, and WHAT-AM. Assistance with cultivating donors for exhibitions and symposia comes from local, national, and foreign sources, including a vice president of Ciba-Geigy, the director of the Austrian Cultural Institute, and the cultural attaches of the Netherlands, France, and Israel. Volunteers give special tours and provide hospitality and transportation for artists and event participants. Last year, Friends of the Galleries served as a sales staff for "History for Sale" and 24 volunteers produced and performed "Delivery" with the Bread and Puppet Theater. Within the college, individual administrative staff, scholars, and artists take an active part in gallery programming and outreach; these volunteer efforts are officially supported by the Gallery Committee and the Student Exhibitions Committee. Recruiting and maintaining much of this support structure is the 30-member Friends Advisory Board of the galleries and its 3 standing committees: Nominating, Development, and Marketing. Both Development and Marketing (a recently constituted committee) include members not on the Advisory Board.

### **How does the museum acquire non-federal financial support?**

The Paley/Levy Galleries at Moore maintain their own budget within the college's overall accounting structure and have always operated within their income, even in difficult financial times. The most important factor in this financial stability is the endowment, which honors Rochelle Levy, alumna and trustee of the college. Given in \$200,000 increments from 1990 to 1995, the endowment now stands at \$1,653,722; the galleries are authorized to spend 80% of the earned income in any given year, but, because of successful fundraising, they have never had to draw down more than 33% of earnings (\$150,000 in FY98). Annual support comes from the Pennsylvania Council on the Arts--\$22,000 in FY99--and from the Philadelphia Cultural Fund--\$8,600 in FY99. Together, support from state and city, money from endowment income, and college allocation (discussed below) make up 45% of the galleries' \$599,238 annual revenue; an additional 3% of budget (\$15,000) comes from a partnership arrangement with the College Art Association for the Multicultural Curatorial Intern. The galleries have also received state money for special projects: in 1997, the Pennsylvania Historical and Museum Commission allocated \$20,000 for development of the Levy Gallery Slide Registry.

As part of Moore College, the galleries are provided with their physical plant; receptionist; auditorium; conference room; mailroom; audio-visual services; development and public relations support; food service; utilities; cleaning and maintenance; and the use of a van. The college's annual allocation to the galleries is \$90,000. The college expects to

increase this amount in FY2000, allowing the galleries to reduce the percentage drawn down from investment earnings (see Governance).

A major endorsement for the galleries is the 22% of their annual budget awarded in grants from foundations and corporations. Over the past two years, 18 grants, ranging from \$1,000 to \$115,500, came from donors that included the Arcadia Foundation, CoreStates Bank, Nathan Cummings Foundation, William Penn Foundation, Pew Charitable Trusts, The Judith Rothschild Foundation, and the Andy Warhol Foundation; as well as such foreign foundations and agencies as the Austrian Cultural Institute, Nestle Foundation for the Arts, and Pro Helvetia Arts Council of Switzerland. A current initiative seeks to fund a series of exhibitions, beginning in FY2000, that feature the work of French artists; funds are pledged by two French cultural organizations.

The broad base of private support for the galleries comes from the Friends of the Galleries program with 600 paid members; individual gifts in FY98 totaled \$103,064. Friends are cultivated through luncheons and dinners, cocktail parties, art courses, and the Members Tours program. Friends gifts are organized in categories of \$50 to \$10,000 and acknowledged in exhibition catalogs and the Annual Report. Individual Friends are the galleries' best source of potential donors, helping gallery staff to target those who will support specific exhibitions or projects that match their interests. Last year, this effort provided money for "Moshe Kupferman," publication of the Slide Registry to the Internet, Student Tours, "The Philadelphia Ten," and two catalogs. In 1993, a gift of \$100,000 launched the Sasha Levy-Barris International Program for traveling exhibitions; to date, an additional \$250,000 has been raised for this program.

Earned income has recently increased to 7% of the budget. Working closely with the Marketing Committee, the staff has laid out new strategies to meet changing realities in the art world. Benefits, courses, symposia, film series, fundraising events, and venue fees help to pay for related programs. Without competing against commercial galleries, we are beginning to sell art from alumnae and faculty shows; also, sales of art occasionally fit the program, as successfully demonstrated with "History for Sale: 2,000 Paintings by Stephen Keene." A catalog marketing project is new: ISBN numbers have been obtained for 47 past and present catalogs, which are now available on our website; a selection of these is also available through Amazon.com. Partnerships are in place with the Philadelphia Museums Shop at Philadelphia International Airport and the Philadelphia Museum of Art to carry a selection of our catalogs. "Benedetta's Feast," held in conjunction with an exhibition and symposium, attracted a paying audience of more than 200 for a futurist repast, and provided a model for our fall 1999 benefit party: "One Hundred Tea Cups" will feature one-of-a-kind teacups made by an acclaimed Philadelphia ceramic artist. Plans are in development for an online shop, "The Cyber Art Cart," featuring handmade objects by local artists and Moore students, as well as the hugely popular \$3-10 paintings by Stephen Keene.

## Support

### 1. How does the community's non-cash support of museum operations demonstrate commitment to the museum's services?

The community supports the Museum in many ways: donations to collections by businesses and individuals; enthusiastic community involvement in special events, outreach, and school programs; contributions of time and expertise by members of the Museum's boards; loyalty and commitment of volunteers; and overwhelming support of the people of Missoula, who visit the Museum and participate in the programs. The Museum's largest source of non-cash contributions is in the form of donated objects. In 1997, 1,176 objects were donated to the Museum, including uniforms, furniture, and photographs. To date, over 80% of the 22,810 objects in the collection were received by donation. Donated labor and services are another vital part of the Museum's operations, in many forms: the retired University archivist assists with exhibits, collections, registration, and grounds maintenance; one individual maintains membership; a dedicated corps of docents give tours throughout the year; high school classes come out in the spring and clean up for the season (cleaning brush, painting, weeding, dusting); the Army Reserve and vo-tech heavy equipment class use the grounds for projects (landscaping, amphitheater construction, and trenching for electrical lines); Eagle Scout projects provided new railings, fencing around the archaeological site, and access ramps; a local construction company installed a new ramp on the main building; Champion International donated a rare, Shay-type locomotive and cars; a contractor donates his equipment and time to move large objects, haul gravel, and bulldoze; and a carpenter donates his time to build special cases and repair objects (under the curator's supervision) for exhibits. With the arrival of the barracks, the community rallied: a local concrete company donated the concrete for the footings and foundation, local unions donated installation of the plumbing and electricity and pouring of the foundation, and over 100 volunteers worked 3 days in 1995 and 70 for 2 days in 1996 working to repair and re-roof the barracks and warehouse, paint other buildings, and repair the gazebo. In 1998, the community rallied for the construction of the amphitheater -- \$35,916 in donated supplies, \$10,000 in sponsorships, and \$55,023 in donated labor, including the "volunteers" from the Missoula Correctional Services (alternative sentencing). (NOTE: None of this is included in Form C because it was construction-related.) The Museum has agreements with the U.S. Army Reserve and Montana National Guard, both of which have engineering battalions at Fort Missoula; the units always need training projects (carpentry, plumbing, electrical wiring). In the past they have helped to remodel the depot, lay railroad track, erect fencing, transport heavy equipment, dig an irrigation well, remodel the sales shop, and help with the barrack's restoration and amphitheater construction. The arrangement has enabled the Museum to make use of skilled laborers on projects for the cost of supplies. The Western Montana Mental Health Clinic, located just off the Museum grounds, allows the Museum to use a large section of its basement for secured, controlled storage. A number of volunteer support groups contribute numerous hours each year. In addition to the Friends, members of the Society of American Foresters devote time and equipment to develop the forestry interpretive area; members of a teacher's sorority conduct authentic 1920s one-room schoolhouse experiences for area third graders; the Missoula Model Railroaders assisted the Museum by heating the interior of the historic depot, raise funds for restoration, maintain a large miniature train set in the depot, and operate the exhibit during special events; the Missoula Iris Society maintains a set of iris test beds and a formal garden area behind the Museum building and conducts a city-wide garden tour in the spring; the Society for Creative Anachronism trades labor for use of the grounds for special events and has helped with painting, installing exhibits, and moving heavy objects; beginning in 1999, the Missoula Botanical Garden Society will use a 2-acre plot to establish and maintain a Lewis & Clark-themed garden; the United Peoples Foundation puts in hundreds of hours planning and conducting the annual Summer Powwow in cooperation with the Museum; and the Retired Senior Volunteer Program provides volunteers who work 2 1/2 hour shifts at the reception desk, assisting visitors and performing a variety of projects for the staff. Every visitor is considered a potential volunteer and volunteer forms are available at the reception desk. Volunteer training and appreciation events help to maintain a friendly and professional volunteer force (8,279.7 hours were volunteered at the Museum in FY 98).

The Museum makes use of public service announcements and other no-cost methods of advertising, with staff appearing regularly on 1- to 5-minute segments of the community affairs portion of the news, public service announcements on radio, a 2-hour documentary on the local access cable station, and articles in the city's newspaper. One local television station helped with the production and narration of the Museum's new orientation video. Local businesses and organizations also have been generous in their donations of material and services: Pew Construction donated an access ramp, Insured Titles contributed a telephone system, Hennessey's Department Store donated carpet, M@RSWeb donated 6 months on the Internet and a home page, Sears allowed the Museum purchase a tv and two VCRs at cost, supermarkets donate apples for the Apple Days program, a copy company donated 4th of July fliers, an individual donated a computer monitor, and companies regularly allow the Museum to obtain services or products at cost such as Plexi-glass, lumber, and paint. Companies donated literally thousands of tons of dirt and railroad ties for the amphitheater, plus countless construction and electrical supplies. Community support is most visible at special events and outreach programs. At the annual 4th of July Celebration, Summer

Powwow, and Frontier Day, craft guilds, Native American groups, local dance and music clubs, University performers, YWCA, fire departments, search and rescue teams, Boy and Girl Scouts, Forest Service volunteers, as well as individuals and members from the ancillary groups play active roles. The University, Salish-Kootenai College, area teachers, local history experts, staff from the Rocky Mountain Elk Foundation, National Forest Service, ROTC and others are always generous in providing consultants, speakers, and programs. The University also provides the Museum with 2 to 3 interns each year and one Brownian Fellow each semester, and a high school intern is supplied each year by the Human Resource Council.

## **2. How does the museum acquire non-Federal financial support?**

The Museum is a department of Missoula County, and 3/4 of its budget comes from a special property tax mill levy allocated by the county commissioners and administered by the Board of Trustees through a professional director. County support has increased considerably since the Museum was founded, most recently with a 5-year commitment to provide the Museum with \$25,000/year to repair and renovate the main Museum building. Yet the Trustees, Friends, and staff recognize the need to broaden the non-tax support, which led to the institution of a modest admission policy in 1995. Visitors continue to support the Museum by placing \$3-4,000 in donation boxes each year. The Friends was established in 1977 for the purpose of assisting the Museum in accomplishing its goals and purposes. The Friends serve as the major fund-raising arm of the Museum and provide funds for projects and activities not covered by the county budget. The Friends Board of Directors draws up a budget each year, with the concurrence and guidance of the Museum director. The Friends have established an endowment, and the Finance Committee launched its first annual campaign in the autumn of 1998 and placed funds with the Montana Community Foundation to facilitate planned giving. The sales shop is operated by the Friends, with their own contracted manager; the store has not made much money, but the manager has been making many improvements and increasing inventory, after attending a Museum Store Association meeting. The Friends are responsible for the installation of one exhibit a year, paid off a \$10,000 loan for the repair of three furnaces, and voted to provide \$10,000/ year to help with operations. The Friends perform other vital functions: administer the personal and corporate membership programs, operate the sales shop, publish and mail the quarterly newsletter, host receptions for exhibit openings and special events, coordinate large festivals, and conduct fund-raising events (4th of July Celebration, Frontier Day, benefit concerts, etc.). Projects include: restoring the 1910 depot and 1863 church, installing security, maintaining irrigation systems, printing 10,000 self-guide tour brochures of the site and 25,000 fliers for distribution throughout western Montana each year, and funding Apple Day tours for school groups. The Friends cooperate with local non-profits, exchanging mailing lists for membership drives and publicity. A very lengthy contract between the Friends and the Fort Missoula Theatre Company provides a sliding flat rental fee, a percentage of gross proceeds, and 100% of the concessions on beer and wine to the Friends.

The Museum receives grants and donations from various sources. The Museum received \$3,500 in FY 98 from the Blackfoot Forest Protective Association for the forestry interpretive area, \$500 from Insured Titles and First Bank for an exhibit, \$5,000 in a memorial for exhibits and the forestry area, \$10,500 gross from Norwest Bank, Montana Rail Link, Coca-Cola, Bitterroot Motors, and Montana Mortgage for the amphitheater. Past contributions include: Champion International's \$2,500 and the use of a 6-man crew and equipment for one week to dismantle, move, and reassemble the lookout tower; \$25,000 from the Burlington Northern Foundation to complete the first two phases of the development of a new outdoor forestry interpretive area (now complete); and \$15,000 from the Washington Corporation to move a 70-ton locomotive and tender to the Museum in 1989. Local service organizations and companies have given money for a variety of causes: Altrusa, International - signs for the forestry interpretive area; McDonalds' restaurants - a natural history resource kit; the Missoula Model Railroaders - \$4,000 to renovate the depot; Pepsi Cola - sponsorship of a benefit concert; Pilot International - \$1,800 for access ramps; Piper & Jaffray, Montana Power, First Interstate Bank, Missoulian newspaper, University of Montana Foundation, Montana Cultural Trust, Montana Committee for the Humanities, USWest Foundation, and Western Montana Radio Network have co-sponsored temporary exhibits with donations of \$500 to \$9,165; Bitterroot Motors, University Motors, Budweiser, Pepsi, Coors, and Norwest Bank have sponsored the 4th of July Celebration and Frontier Day; Montana Rail Link - paint and equipment for the locomotive; and the Montana Committee for the Humanities - lecturers. Individuals also support the Museum with donations from a child's penny to an anonymous \$5,000 that support programs and exhibits, purchase a riding lawn mower, and establish an endowment. A major membership drive for the Friends is underway.

## Long Range Plan

From the outset of its existence as a museum, the Hans Herr House and Museum had four general long-range objectives as designated by the Lancaster Mennonite Historical Society: that the 1719 House be maintained as the focal point of the museum; that the House should be interpreted accurately according to its period; that the museum be developed to tell the larger story of the Mennonite history and beliefs of which the House is a part; and that it be developed to meet quality museum standards such as those endorsed by the American Association of Museums.

Recognizing the need of a more concise and comprehensive plan, the director, the Administrative Committee, and the Board of Directors formulated a long-range plan in 1988. The eight listed objectives of that plan were: (1) improvement of present facilities rather than expansion; (2) increased emphasis on living historical interpretation; (3) continuation and expansion of the museum's research programs; (4) expanding visitation; (5) expanding Foundation membership; (6) achieving financial stability; (7) continued emphasis on the interpretation of Mennonite history and culture; and (8) upgrading museum standards and procedures with the eventual goal of AAM accreditation. The museum considers these resolves as tools which help the institution better achieve the general goals set forth in the original long-range objectives.

The plan placed each of the above goals within the context of specific two, five and ten year goals. Most of the two year goals were achieved by 1990: writing and publication of a Hans Herr House history, increased school visitation, development of the 1835 House, and completion of a comprehensive furnishings plan for the 1719 House. In 1994, an additional goal was met: increasing the endowment to \$50,000. In 1996, the museum successfully achieved the last of the original two year goals, that of back accessioning 50% of the museum's collection. The museum worked on these objectives while it also aimed at the 5 year goals.

The plan's major five year goal included an increasing focus on living historical interpretation of the site. Completed in 1993, this involved historical landscape around the House with the addition of an 18th century Pennsylvania German-type raised bed garden, a small plot near the House planted alternately with rye, wheat or flax, and appropriate fences. The other major 5 year goal, to increase collections storage space, is nearing reality as the museum concludes a successful fund drive. Though belatedly, the plans to build a structure in 1999 to house portions of the agricultural collection come as a delight to members of the Administrative Committee, staff, and constituency after ten years of dreaming and planning.

One important ten-year goal that has been met was also a challenging one: to provide adequate buffers for the museum site from the housing developments which are rapidly annexing farmlands adjacent to the museum grounds. Working with the owners of the two farms which combine to border three sides of the Herr House property, the institution now sees the fruits of these efforts: One of these farms has had its land placed into an agricultural preserve program. The other farm's owner has applied for this same program. This is especially good news for an agriculture-related museum that desires to see its surroundings reflect that environment, and is evidence of the cordial relationship the museum enjoys with its neighbors. A remaining ten year goal is a second phase of historical landscaping.

During the past ten years the long range plan was subjected to continual updating and review. However, with a decade having passed since the formulation of a complete set of new specific goals, in 1997 the director initiated a comprehensive self-study of the entire institution, resulting in an extension and expansion of the long range plan. This included minor revisions in the eight objectives mentioned above (i.e., "maintaining," rather than "achieving," financial stability in #6). The museum has again set two, five, and ten year goals, taking into account those which were not successfully attained previously.

The new set of two-year goals includes improved signage along roadsides in the vicinity of the site, upgrading the computer systems in the museum office, expanding the staff office area, and developing the 1835 House and grounds for more day-to-day use. Some of the five-year goals are to improve the Visitors' Center and build an addition onto it, reshingle the 1719 House, and to increase the endowment to \$200,000. Ten-year goals include increasing paid staff and installing climate control in the Herr House. All general objectives and specific goals are held against the standard of the museum's Statement of Purpose.

The museum's formal procedure for adopting, evaluating, updating and implementing long range plans follows the same path as questions of policy. The Administrative Committee and the museum director draft and approve the plans, which are then sent to the Board of Directors for final approval. Input from volunteers, Committee members, Board

members, and Foundation members was used during the 1998 revision of the long range plan. These people were polled for their visions for the museum, and suggestions on implementing their ideas. The IMLS GOS application process itself is one opportunity to evaluate all aspects of the museum's operation on the basis of current museum standards. This opportunity is renewed with each additional GOS application and proves helpful in the long-term planning process.

The museum has always recognized the need for an ongoing process of review, with the statement of purpose and four objectives as designated by the Historical Society remaining constant. This review process is done annually by the director and the Administrative Committee, with any substantive changes being submitted to the Board. The IMLS-GOS application process is an effective tool for assessing the museum's progress every two years. A MAP I survey was helpful in setting long term policy, especially in the area of finances.

The Hans Herr House and Museum has used its past GOS grants to provide for the employment of two part-time staff. One of these individuals is the education coordinator. The other serves as the curator. Presently, the 1997 GOS grant is being used in this way. Employment of these two individuals, made possible with GOS funds, has allowed significant advances to be made toward the long term goals of the Hans Herr House. If the museum receives GOS funding again in 1999, those funds will be used to make further progress in these two areas by maintaining the employment of staff persons capable of carrying on this work.

## Long Range Plan

### 1. How does the long-range plan support the mission of the museum? 2. How does the museum develop, implement, and update the long-range plan?

After the key components of the Heart of the Zoo campaign were completed with the conclusion of the campaign in fall 1996, the Board began a new strategic planning initiative in 1997. During 1997-98, the Zoo Society's Board of Directors developed a thorough five-year plan for Lincoln Park Zoo. The process produced not only a plan but a refined zoo mission and ambitious goals. The plan touched every aspect of managing the zoo: sustaining the animal collection, evaluating visitor services, improving animal and visitor facilities, and increasing Lincoln Park Zoo's role in worldwide conservation efforts. Financial implications of implementing these plans were also detailed. The goal of the strategic plan is to make **Lincoln Park Zoo the best urban zoo in North America.**

The long-range plan was divided into four components that reflect the zoo's commitment to education, conservation, research, and recreation mission statement. The divisions of the plan are as follows:

- 1) For the Animals - Renovate or completely rebuild all less-than-optimal habitats and facilities. Specific targets included the Regenstein Large Mammal Habitat, Lester E. Fisher Great Ape House, the Pritzker Children's Zoo, and the Farm-in-the-Zoo.
- 2) For the People - Improve visitor services and amenities including an enlarged retail center, and additional dining opportunities. Enhance visitor educational opportunities through improved interpretive signage and expanded docent training and management. Offer additional on-grounds programming and create more group tours and educational lectures.
- 3) For Conservation - Expand the conservation mission to fund field work in Africa and Asia, in addition to Central and South America, where the zoo remains a leader. Focus ex-situ conservation efforts on genetics and demography of small populations of animals to make captive breeding programs more successful, especially as zoo-bred animals are reintroduced to the wild. Increase the effectiveness of the zoo's education programs through closer ties to its conservation and research efforts; e.g., by teaching zoo visitors and local residents that their individual actions can make a difference.
- 4) Financial Implications - To implement the components of the long-range plan, several financial priorities were determined: increase annual giving for operations and programs to \$5 million during the next five years; emphasize planned giving to generate \$1 million in annual distributions; increase membership to 22,000; establish a stronger endowment by adding \$10 million in donations; increase earned revenue through improved food service, and parking opportunities; more fee-based programs; and a new retail center with improved merchandising. Control costs through a rigorous budget review process, efficient operations, and refined financial management systems and policies.

**The relationship between the components of the long-range plan and the zoo's mission statement is clear - to sustain and expand Lincoln Park Zoo's role in international conservation through superior animal facilities and management, and to better meet the educational and recreational expectations of its visitors while remaining free and open to all.**

2. In past planning efforts, the Chairman of the Board had appointed a committee to develop a long-range strategic blueprint for the zoo. Because of the strength of the current committee structure, the Chairman asked that Board committee chairmen lead the most recent planning process within each of 10 standing committees. This enabled Board members familiar with each area, including education, conservation, collections, nominating, and development steering committees, to consider how their specific areas contributed to the overall goal of becoming the best urban zoo.

The planning process was facilitated by the Boston Consulting Group, which developed a series of templates that were crafted into a narrative plan. For eight months during 1997, Trustees, senior staff members, and consultants met on a bi-monthly basis to review zoo history, finances, community concerns, the external environment, and the current level of professionalism and purpose in the zoo community. These meetings culminated in September 1997 in a full-day conference attended by more than 70% of active Board members. During the morning conference session, each committee chair presented his or her mission statements, priorities, and goals to the full group. In the afternoon, the Board was divided into four groups that considered institutional priorities and made recommendations and refinements to the committees' plans. After the conference, committees met to affirm their goals, and a thorough document outlining targets and objectives though 2002 was crafted and approved by the Board in June 1998.

Additional professional counsel is being utilized to complement these planning efforts. As part of the Board's goal to significantly increase membership revenues, zoo staff are working with Lipman-Heame, a nationally recognized communications and marketing firm. A market research study will seek guidance from zoo members, non-members, from both urban and suburban communities. This major study was initiated in late 1998; the desired outcome is a blueprint to increase membership levels to 22,000 and beyond.

The Long Range Plan is used to guide annual operating plans to ensure consistency with the zoo's goals and mission. Operating plans are created as an annual measure of progress on the long-range plans, and are key to integrating the long-range plan into daily zoo operations. The process includes employees at every level. As part of the budget process, evaluations are conducted by each department against its operating plans of the year past, with review by zoo leadership and Board members.

It is important to note that the long-range planning process at Lincoln Park Zoo is ongoing; zoo staff began a formal update of the 1990 plan in 1994/95 with a series of meetings assessing zoo programs and its collections. Zookeepers, curators, volunteers, and docents all provide valuable first-hand feedback that is incorporated into plans for improving facilities and programs. The timeline for the development and implementation of the long-range plan is structured as follows:

Phase 1 (1998-1999): Campaign Development. Zoo staff will meet with Board members and campaign counsel to structure a new capital and endowment campaign, with specific physical plans and cost estimates. Utilize collaborative, interdepartmental teams to determine facility components and financing opportunities. Complete planning for renovation of Regenstein Large Mammal Habitat.

Phase 2 (1999-2000): Fundraising and program refinement. Raise \$10 million in gifts and pledges towards the first phase projects, including the Great Ape House and Farm-in-the-Zoo. Develop construction documents and begin considering next phase projects. Evaluate success of enhanced education and visitor services programs and activities and refine as necessary. Develop formal endowment campaign guidelines and naming opportunities.

Phase 3 (2000-2002): Ongoing construction and program evaluation. Complete construction of Regenstein Large Mammal Habitat and Great Ape House. Begin renovation of Pritzker Children's Zoo and the Farm-in-the-Zoo. Review and refine conservation and education programs, utilizing outside, independent evaluators to determine their effectiveness and relevance to the zoo's mission and to its constituencies. Continue fundraising for strategic capital projects. Consider increasing endowment goal to reach \$35 million target by 2007, as outlined in strategic plan.

Thousands of staff hours were committed to this process. Every zoo department participated in the planning process, including animal collections, education, conservation, development, marketing, public relations, and finance. The Boston Consulting Group team donated its time and expertise, and acted as facilitators in committee meetings and during the conference session. Issues ranging from animal management, operations, and education, to marketing, fundraising, and visitor services were integrated into planning.

### **3. How will GOS funds, if awarded this year, be used to further the museum's purpose?**

Lincoln Park Zoo would apply the 1999 GOS grant to support the operating needs of a privatized institution, to maintain the zoo as a major educator of adults and school children, and **to keep the zoo free without compromising its high standards for animal care and visitor services.** In 1999, the zoo will spend more than \$1 million on education and outreach to disadvantaged populations and city residents. A General Operating Support Grant would help Lincoln Park Zoo strengthen the links between its education and conservation efforts, making conservation realistic and compelling for visitors, and expanding the audience's conservation ethic. General Operating Support also will allow the zoo to enhance its on-grounds programming and the visitor experience through expanded education initiatives.